CASE STUDY

UC San Diego

Advancing Strategic Priorities through Crowdsourcing

BACKGROUND AND STORY

The University of California, San Diego (UC San Diego) is recognized as one of the top 15 research universities worldwide. Established in 1960, UC San Diego has grown at an exceptional pace, now with a total campus enrollment of 35,821 students, $4.3 billion in fiscal year 2014/15 revenues, of which over $1 billion is in research funding, and 16 Nobel laureates having taught on campus.

Bob Neuhard is a business professional and licensed attorney who has extensive global experience leading mission critical strategic engagements across national and international organizations.

He has worked at UC San Diego for 11 years and currently serves as the Executive Director of the Office of Operational Strategic Initiatives which is charged with identifying, responding to, leading, and supporting unique initiatives and opportunities across campus on behalf of the Chancellor and the Chief Financial Officer. Bob started his UC San Diego career as the Director of Strategic Sourcing, forging the campus strategy and leading highly successful campus and UC System initiatives. Professionally he has served in senior leadership positions at Owens Corning, Fireman's Fund, First Data, and Apollo where he led strategic global negotiations with governments and corporations in support of new and expanding business lines and was responsible for creating, leading, and transforming service and operational areas at each entity. He specializes in building consensus in highly dynamic situations by developing comprehensive strategies and innovative solutions to the most complicated and novel issues and opportunities. His focus is on strategic leadership and alliances, high impact negotiations, innovation, and delivering transformational outcomes. Bob received his Bachelor of Arts in Political Science with a minor in Environmental Studies from the University of Florida. He received his Juris Doctorate from the University of Denver – Sturm College of Law with emphases on technology law & aviation law, and he served as an Editor for the Denver Journal of International Law and Policy and the Transportation Law Journal.

Melani Roberson MBA, is a system program manager with an affinity for collaborative problem solving and innovation management consultation on campus.

Melani Roberson started her career in 2004 in marketing for a small family owned business, Noah's Protective Structures. Working for a small business meant becoming proficient at being resourceful regardless of her official role and title. After attaining her business degree from California State University San Marcos, she went to work for a for-profit University located in San Diego as an Academic Advisor helping online students with scheduling and program requirements for graduation. In 2010, Melani was promoted to project manager on the Policy and Implementation team, which oversees all student facing policy creation and review. One of Melani's specific responsibilities that she excelled at was managing the email system content and functionality. She also oversaw the document repository that the University staff regularly used for official documents and forms. Balancing between project management and system administration meant that when a position opened up at UC San Diego in 2016, Melani was a qualified candidate to take the reins for the ideation tool and program, IdeaWave. In her current role as Senior Strategy and Innovation Analyst, she leads key initiatives through implementation that support the attainment of operational excellence. In addition to overseeing complex business problem discovery and solutions architecting, Melani is enthusiastic about being user-focused when aiding various stakeholders in the implementation of creative and innovative changes. She enjoys educating her campus stakeholders on innovation management best practices and driving results through the IdeaWave program.

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To go from where UC San Diego was in the 1960's, to where we are today, we've had to be very collaborative, innovative, and entrepreneurial in nature across all facets of teaching, research, public service, and operations, but, over the course of 50+ years, state funding has decreased dramatically, walls have gone up due to our sheer size, and you begin to have problems knowing who to talk to, who is doing what? To maintain the collaborative and entrepreneurial mindset that got us where we are today, we have to find ways to break down those walls, reduce the silos, and make the right thing to do the easy thing to do.

Bob Neuhard, Executive Director

In 2013, Chancellor Pradeep Khosla launched a comprehensive and inclusive strategic planning initiative with the goal of defining a unifying vision and set of shared goals for the campus, at what was seen as a critical point in the history of UC San Diego. UC San Diego understood that the strategic planning process, and the collaboration and communication channels it established, were as important as the creation of the final document.

The strategic planning process was a tremendous success and with over 10,000 people providing input the Chancellor was able to honor and leverage the entrepreneurial, collaborative, and innovative culture that makes UC San Diego so successful. The 2014 Campus Strategic Plan set forth a new mission and vision, an articulation of values, five overarching goals and 13 initial strategies.

Once the strategic plan document was published it was clear that the university needed to find a way to continue the discussions across the campus and shift from "planning" to "doing." Chancellor Khosla saw this as an opportunity to scale and harness the cross-campus collaborative dialogues in a sustainable way, while focusing the collective genius on key issues, opportunities and outcomes. It was from a deeply rooted desire to reinforce and expand on these meaningful and collaborative discussions that UC San Diego decided to launch a digital hub across all members of campus. In this case study, we will look at how UC San Diego planned and launched this initiative, linking it tightly with the strategic goals of the university.
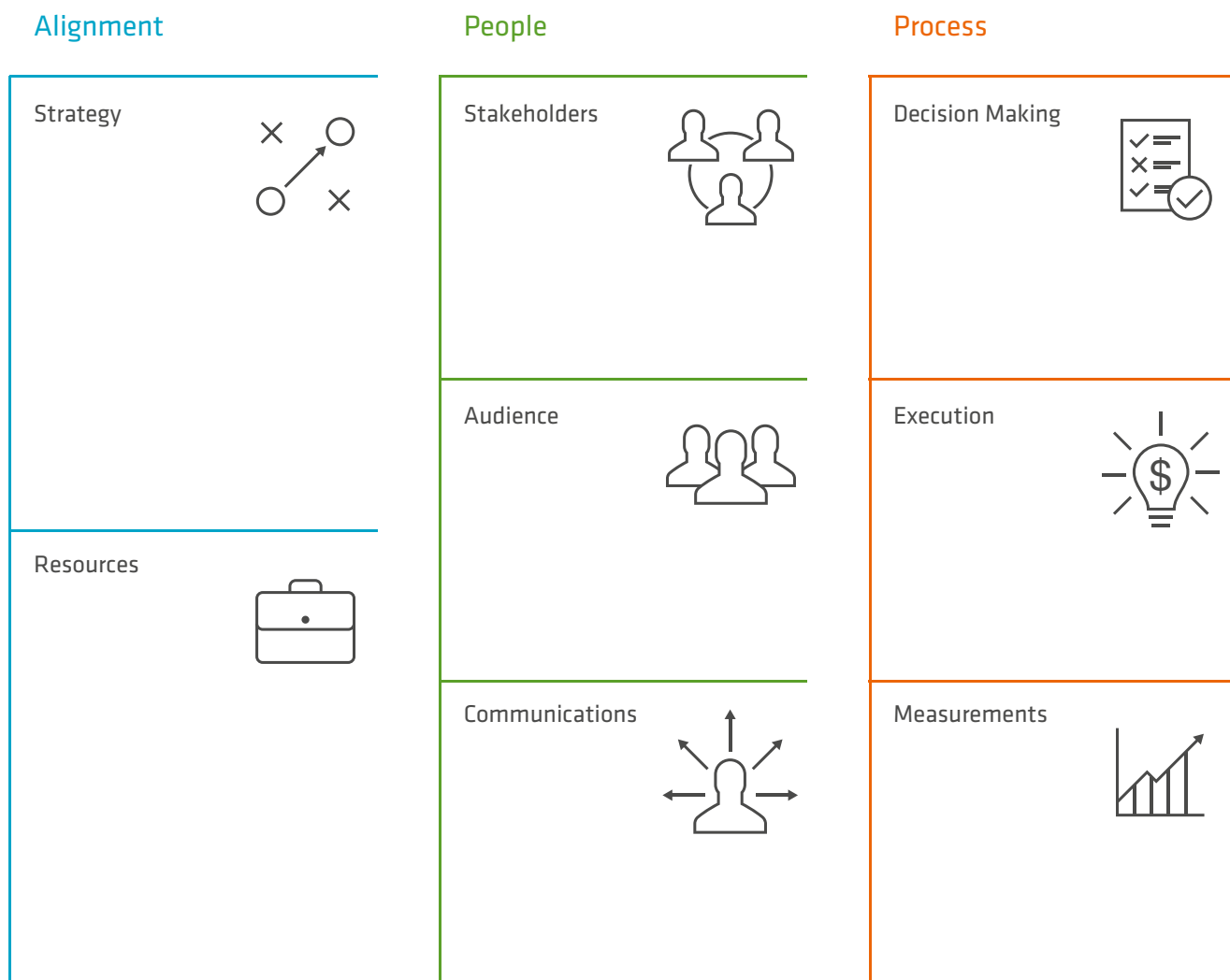
At the request of the Chancellor, Robert (Bob) Neuhard, Executive Director for the Office of Strategic Initiatives at UC San Diego, developed a set of requirements for an idea crowdsourcing platform and began the search for a tool that would facilitate collaboration across the campus. After searching and vetting multiple vendors, HYPE Enterprise was selected for the following reasons:

• Strategic innovation areas could be mapped into the platform, to allow for targeted collaboration around the UC San Diego strategic goals.
• High volumes of input could be effectively managed with community graduation of ideas, and evaluation tools.
• The concepts and projects features allowed for tracking of ideas from conception to development and maturation, within one single tool.
• HYPE's services team offered a partnership that would help UC San Diego to achieve its goals.

In 2015 the HYPE Enterprise platform was launched – branded as "IdeaWave" – to over 34,000 faculty and staff. When promoting the launch, the focus was not specifically on gathering ideas or innovation, but rather the practical aspects of collaboration: developing high quality dialogue and discussion around important issues that arose from the strategic planning process, and the future of the university. Furthermore, the Office of Operational Strategic Initiatives were keen to establish an infrastructure that would spur innovation through improved collaboration and engagement across UC San Diego departments.

THE COLLABORATIVE INNOVATION CANVAS

Alignment	People	Process
Strategy	**Stakeholders**	**Decision Making**
Resources	**Audience**	**Execution**
	Communications	**Measurements**

The Collaborative Innovation Canvas is a simple way to map out the key components of an innovation management platform. It focuses on three main aspects: alignment (with the larger strategic goals around innovation); people (the stakeholders, advocates, and general audience); and process (selecting, funding, and tracking ideas). The canvas captures the big picture, and the crucial elements needed for success. It allows everybody involved to easily understand and share the big picture. Therefore, it lends itself well as a frame for exploring a case study.

Further reading:
http://www.hypeinnovation.com/canvas
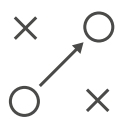
STRATEGY

How the innovation management program is aligned with institutional strategic priorities.

In structuring the crowdsourcing activities, the first step was to ensure a clear link to the five strategic goals of UC San Diego's new strategic plan (see sidebar: UC San Diego 5 Strategic Goals). The strategic innovation areas in HYPE Enterprise allow you to do this, which are there to define the hunting grounds for ideas. An idea campaign is then tied to a strategic area, making it transparent to all users what the driving force is behind a particular campaign.

It was envisioned that IdeaWave could be used for a wide array of activities, including research, student experience, and community engagement (see Next Steps), but the initial starting point was to focus on operational improvements. At first, there was a degree of hesitation because operational improvements often result in trying to do more with less. To ensure outcomes were helpful, rather than damaging, a set of guiding principles were put in place for evaluating both the framing question of a campaign, and the ideas being selected; The initiative, questions asked, and ideas selected must support one or more of these aims:

- Help a researcher create more time to spend in their lab, perform research, submit proposals, or publish.
- Improve the student experience, either directly in the classroom or through experiential activities and opportunities.
- Help a faculty member create more time to spend with students, perform research, or publish.
- Help a faculty or research administrator focus on their most mission critical work.
- Improve the health or welfare of our community.

In the first year of running IdeaWave, the focus was on the quality of engagement and creating awareness, rather than the quantity of ideas. It was critical to build trust with the audience by having the Chancellor as the overarching sponsor, providing feedback to the campus community, and implementing ideas quickly. To achieve this, the team started with campaigns focused on improving staff and faculty experiences and operational improvements.

From a cultural perspective, improving staff and faculty experiences would hopefully validate the underlying goal of showing that the campus was not looking for pure cost cutting, but to take actions that would benefit the entire campus. The second year of the program expanded on the success of the first year, and has seen a wide range of new use cases, many of which require more substantial project investment for implementation. Furthermore, the challenge now is to build a culture of continuous innovation, with IdeaWave positioned as a central tool for enabling this.

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The ability to have a campaign and dialogue within the construct of the strategic plan goals creates transparency with people. It also shows to managers how each idea coming through can be linked all the way up to the 5 goals of the strategic plan. Additionally, not everyone reads a strategic plan document, you can't get 60,000 people to absorb it and if someone doesn't see projects and specific actions that relate back to the plan, then in many people's minds it simply hasn't happened. By cascading and aligning everything to the plan through IdeaWave we are able to raise the awareness of the plan and help people understand how their input directly relates to the plan goals.

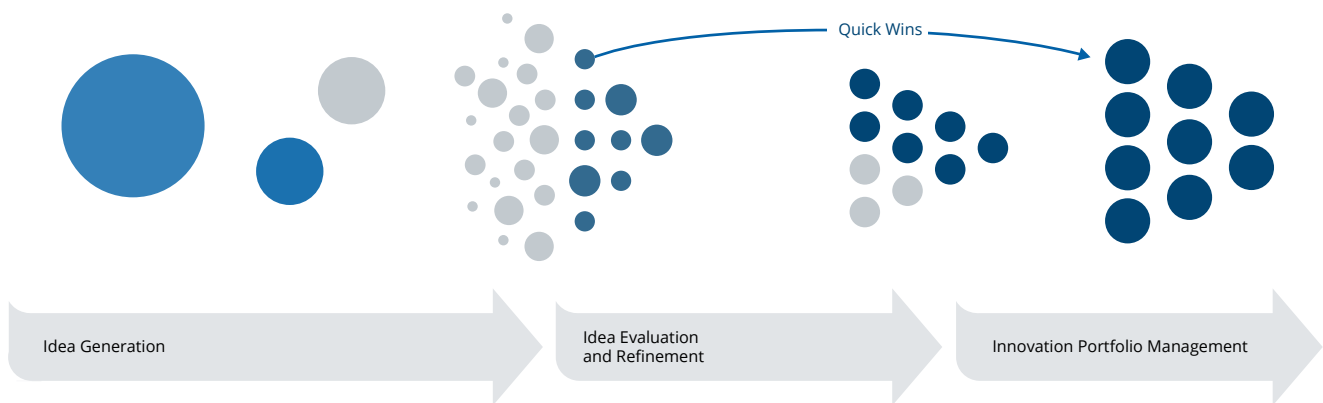**Bob Neuhard,** Executive Director

UC SAN DIEGO 5 STRATEGIC GOALS

GOAL 1 Delivering an educational and overall experience that develops students who are capable of solving problems, leading, and innovating in a diverse and interconnected world.

GOAL 2 Cultivating a diverse and inclusive university community that encourages respectful open dialogue, and challenges itself to take bold actions that will ensure learning is accessible and affordable for all.

GOAL 3 Nurturing and supporting a collaborative and interdisciplinary research culture that advances the frontiers of knowledge, shapes new fields, and disseminates discoveries that transform lives.

GOAL 4 Supporting and promoting just and sustainable forms of economic development, shared prosperity, and social and cultural enrichment regionally and globally.

GOAL 5 Creating an agile, sustainable, and supportive infrastructure by ensuring a dedication to service, people, and financial Stewardship.

LEVERAGING COLLABORATIVE GENIUS

THE FRONT END OF INNOVATION

Strategic Innovation Areas	Campaigns & Channels	Ideas

THE BACK END OF INNOVATION

Concepts	Innovation Projects

Quick Wins

Idea Generation → **Idea Evaluation and Refinement** → **Innovation Portfolio Management**

• Stem from the strategic plan and survey data
• Broad framework
• Scalable

• Engage Staff and Faculty
• Time-bound
• Focused
• Originate from prior Campaigns, Leadership, SC-SPOC, and Survey Results

• Score impacts
• Collaboration
• Group ideas
• Review best ideas

• Form Concept teams from Ideas, including SME's and Process owners
• Review and analyze
• Top concepts developed with business case
• Recommend top concepts to Chancellor

• Project Sponsors identified
• Projects resourced
• Formal projects launched
• Dashboards to demonstrate progress and impact
• Ongoing monitoring

RESOURCES

The resources, methods, physical spaces, and budgets available to support the innovation program.

> At the beginning it takes a lot of time to launch effective idea campaigns. Getting the communications right, identifying sponsors, framing the campaigns well, and so on. But when you refine the process, it becomes fast and efficient, and you can spend time on other aspects, like handling selected ideas at the back-end of the process.
>
> Bob Neuhard, Executive Director

IdeaWave is managed centrally by The Office of Operational Strategic Initiatives (OSI), a team created by the Chancellor as one of the outcomes from the strategic planning work. The team reports directly to the CFO, with a dotted line to the Chancellor. OSI is broadly responsible for work that crosses functional and departmental groups – initiatives that cover all or multiple vice-chancellors for example - and to respond to opportunities which require fast action to take full advantage of.

The team has had personnel growth in alignment with the expansion in the projects being overseen and currently consists of 15 people. Four members of the team are clustered in a group called Organizational Performance

Assessments and are focused primarily on running a survey and analytics program for UC San Diego, other Universities and non-profits where their advanced analytics generate insightful and actionable recommendations, identify primary opportunities, and show organizational and customer trends. The remainder of the team focus is on leading and supporting a wide range of campus, and University health system initiatives. The support for the IdeaWave platform and related initiatives takes between 1.5 and 2 full-time people, with the internal lead having a base allocation to IdeaWave ranging from 50% - 70% and the remaining allocation distributed across three people so that we have the ability to flex capacity up as needed.

> As the IdeaWave program manager, a substantial component to this program is spending time educating others on innovation management, and less on the actual technical components. I consult on how to get the best outcomes, best practices, and how to ensure strategic alignment. Without that education piece, I don't believe this program would work as well as it does. It's an ongoing conversation with our customers and partners.
>
> Melani Roberson, Senior Strategy and Innovation Analyst

To help inform and educate on innovation in general, a group of innovation advocates was identified and tasked to regularly inform each other and the innovation program on relevant topics, resources, and initiatives, as well as further develop their own knowledge and skills. There is a focus on process innovation and how organizations innovate, as well as working together to generate ideas.

Many of these users are part of the group of IdeaWave super-users that are called WaveRunners, acting as advocates for innovation, IdeaWave, and specific campaigns. The WaveRunners are updated in advance of major impending initiatives, platform changes and upgrades, as well as progress made on previous efforts so that they are able to promote the program in their specific area and continue to act as a champion for the innovation program.

The OSI team uses a wide range of tools and methodologies to help facilitate innovation, from Lean Six Sigma to Liberating Structures. The purpose of Liberating Structures is to enable groups to break free from traditional organizational dialogues, which often involve a single speaker dictating to the audience, or dominant leaders influencing the direction of thought in groups. By selecting one of the 33 different liberating structures, you can focus the group on a particular perspective, create more collaborative dialogues, and draw more value from and for the participants.

Each structure has a set of guidelines, such as how the physical space is arranged, and what materials are needed; how the participation of the group is distributed; the mix and size of the group needed; and the sequence and time allocation for the session.

For more on Liberating Structures see the website: http://www.liberatingstructures.com/ls-menu/.

Each OSI engagement requires using a mix of tools or methodologies that are chosen specifically and strategically in advance. For example, while OSI uses consistent project and change management components for each engagement, they may use a liberating structure exercise with one group but do an IdeaWave campaign with a different group to explore a specific topic.

" Even as an experienced facilitator, learning how to use Liberating Structures has been a game changer for me. It suddenly became evident how modifying something small like changing the way you ask a question, to larger more tangible changes such as selecting the correct structure that provides the balance between an appropriate level of control needed to guide a particular group while providing freedom for innovation, makes all the difference in the interaction, value, and outcomes.

Melani Roberson, Senior Strategy and Innovation Analyst

" We've run sessions using Liberating Structures both on and off campus, and we've noticed how they help people break from their standard patterns of thinking. They really do work. It's another set of tools that we want to integrate into our innovation processes.

Bob Neuhard, Executive Director
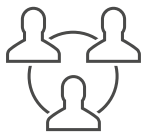
STAKEHOLDERS

The key individuals involved in supporting the program and innovation in general. Including campaign sponsors and management stakeholders.

Having the Chancellor as the overarching sponsor and primary stakeholder for the IdeaWave crowdsourcing program creates a safe and compelling place for members of the campus community to collaborate on initiatives that directly align to campus priorities and take an active role in shaping the solutions. In short, IdeaWave is a top down innovation program that enables bottom-up solutions to key campus priorities. That alignment and positioning has made it quite compelling for new stakeholders (vice chancellors, directors, professors) to adopt and sponsor campaigns early on.

The first adopter of IdeaWave was the Chancellor's Standing Committee on Service and People Oriented Culture (a.k.a. SPOC), which is comprised of 16 faculty members. In working with SPOC, OSI developed a robust and effective governance model for SPOC campaigns that covered every aspect of campaign selection, idea review, scoring, and idea progression. This governance model, while robust, is scalable up to large campus and broad community campaigns and down, to smaller department type campaigns which may not require as much formal governance. This proven and flexible model has enticed additional members of the campus community to approach OSI and enquire about new use cases for collaboration and innovation across and beyond campus.

> " The first campaign launched was sponsored directly by the chancellor, and others quickly realized the potential. It's a great way to get broader input from all across campus, and even beyond campus, whether or not it's for improving onboarding, looking into cultural issues, finding best practices, or myth busting. We now have a lot of interest in using campaigns for different purposes.
>
> Bob Neuhard, Executive Director

AUDIENCE

Who is invited to use the platform, whether it's internal only, or also open to externals? Who can help you expand the success of the program, such as innovation advocates?

The first idea campaign was launched to over 34,000 faculty, and staff, as well as student employees, targeting everyone who had a single-sign-on account in place, which lowered the initial barrier to entry. After this successful launch, the attention turned to all students, who make up close to 35,000 undergraduate and graduate students across the campus. There was a degree of trepidation for bringing the students on board, with some faculty and staff fearing the content would require heavy moderation. Filters were set up in the tool to flag specific words, and extra moderation was put in place to handle the input.

Ultimately, there were no issues with the students joining the platform. One aspect that helped with aligning so many diverse groups of people are UC San Diego's non-traditional terms and conditions. UC San Diego has what are known as the "Principles of Community" for the campus, which are a set of community values describing how to treat people with respect and to value the ideas of others. In lieu of traditional terms and conditions, OSI opted to use the campus' Principles of Community as the terms and conditions for use of IdeaWave. Every time a user signs in to the platform, the values must be acknowledged, as a reminder about the ethos of collaboration in the platform.

The first true "all campus" (faculty, student, and staff) campaign included over 60,000 people and dealt with a sensitive topic that required an educational component as well as crowdsourced input from the entire campus community. In short, due to unprecedented construction projects on and near campus, all of the traffic patterns/flows and parking on campus was going to be heavily impacted for a period of approximately 3 years. Parking spaces were being reduced, roads closed, and the overall impact to campus life was going to be significant, to say the least.

The campaign team included numerous people from the transportation and parking team and the facilities, design, and construction teams, as well as key stakeholders and leaders from campus. A decision was made to use IdeaWave to educate the campus on what was going to happen, excite them about the end state, and invite them to actively provide input to key questions that would help transportation, parking, and construction in minimizing the impact to faculty, students, and staff. The sponsoring groups saw it as an opportunity not just to gather input, but also to tell their story, and communicate the accurate messages about the upcoming changes.

The campaign was highly successful, leading to a series of campaigns around the issues facing students, faculty, and staff in relation to the construction changes on campus.

Over 65,000 people is a large audience, and although the initial effort was to ensure everyone knew about the platform, could access it, and use it, the goal for the OSI team has always been and will continue to be creating high quality conversations. This translates in practice to fewer ideas, but more individuals engaging in dialogues about the ideas through comments, and in general having more collaboration, which moves an idea closer to a solution. This is where OSI has determined that the greatest value is generated, as opposed to a focus just on gathering as many ideas as possible.

" We had faculty members emailing us saying that this was the best thing that has happened to the university coming from the strategic plan. That was a powerful endorsement of the platform and the initiative around it, we knew there was something important here, a need to engage more around these key topics for the university.

Bob Neuhard, Executive Director

Going Beyond Campus

UC San Diego has been exploring numerous use cases and looking at extending the use of the platform with external communities and entities. OSI recently used IdeaWave as part of a National Science Foundation grant where the platform played an integral role in the program development, conference idea generation and dialogue, and post conference idea refinement and reporting recommendation to the National Science Foundation on collective impact as a pathway to reinvigorate broadening participation in STEM. IdeaWave was a tremendous success at the conference and the NSF has requested follow-up with UC San Diego and OSI about both the tool and the organizational model necessary to support a dispersed, non-related, group of important "action takers" who, while having a similar agenda for solving a specific social problem don't seem to attain the desired outcome. Put another way, their collective impact is less than the sum of the parts of all of these passionate and dedicated people working independently.

On the research side, this means including other research entities to collaborate around specific topics, like wearables, cancer targets, antibacterial drugs and resistant biologics. On the industry side, this may mean collaborating around non-core areas of IP, for example with a company sharing what they know about sustainability, and UC San Diego providing their insights and expertise to help the companies reduce the waste which comes from making their products. On the health side, OSI would like to include the patients from their health system's hospitals and clinics, to engage with doctors and nurses, to help improve the patient experience and quality of care.

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The NSF INCLUDES campaign and conference were a tremendous success. The cross-sector teams that came together to work on recommendations for increasing STEM participation was an exercise that proved both challenging and rewarding for the participants. The work produced from each team was recently evaluated by the Graduate Division at UC San Diego and will form the basis for their final report. I think by the end everyone involved will have a sincere appreciation for the process of collaboration on such an immense and broad topic.

Melani Roberson, Senior Strategy and Innovation Analyst

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The possibilities are vast for external collaboration. It's in our interests to open up more, and collaborate with other institutions and companies. This is something we can now do efficiently with IdeaWave, setting up different tenants, giving them a unique look and feel, their own process flow, so that their tenancy is optimized for what they are trying to achieve and doesn't necessarily have the operational improvement focus and theme of our primary IdeaWave tenancy.

Bob Neuhard, Executive Director
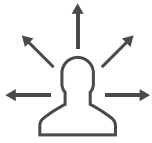
COMMUNICATIONS

How to communicate effectively, create momentum, and build trust with your audience and stakeholders.

To generate awareness of the platform, various tactics have been used by the OSI team, including:
- Ensuring a permanent link to IdeaWave is included on the UC San Diego intranet;
- Information and updates about idea campaigns is included in a regular newsletter;
- Providing succinct updates on progress for the chancellor's blog;
- Large email campaigns sent directly from IdeaWave advertising campaigns.

Additionally, the team has found several useful approaches to campaigns:

- Firstly, using the idea seeding process works very well to create interest in a new campaign with quality early submissions. This approach has proved to lessen hesitation on the basis of being the first to submit an idea.
- Secondly, the final reminder for a closing campaign produces the biggest spike in participation, which is usually one week before closing.
- Thirdly, recognition is used to promote those who take action on ideas, which can be as simple as small gifts like branded coffee mugs, pens, and promotion through the newsletter or blog channels.

Monetary rewards however, have not been used, but rather a focus on recognizing the most beneficial actions and behaviors.

One area which needs improvement, is communicating around the follow-up from idea campaigns. At times the gaps between communications are too long, which can create disgruntled feedback for the OSI team. They aim to provide faster feedback, even if the complete information is not available, to clarify to participants and idea authors the current status of the campaign and where ideas currently sit in the process.

One particular department took immediate action implementing ideas, even while the campaign was still running. Based on the Innovation program and the actions taken by participants, UC San Diego won an award at the 2015 California Public Higher Education Collaborative conference. Back on campus the team was then invited to meet the chancellor and have their photo taken. For the group, this was really a big deal, and for many it was the first time they had met the chancellor in person. For OSI, it was important to recognize the right participant behaviors: constructive engagement, taking the initiative, and the implementation of good ideas.

Bob Neuhard, Executive Director

One idea submitter said she 'had a bone to pick with IdeaWave.' Her idea was a proposal submitted through our open IdeaBox channel. It was a well thought out idea submission but due to set community graduation levels it hadn't yet obtained the necessary votes and comments to be elevated for next steps. Just by talking with the submitter and explaining how to promote the idea further, she was able to generate the interest and support in IdeaWave to elevate the idea for review. Her excitement about her idea finally gaining some traction and her better understanding of the process had shifted her from being a detractor to being an enthusiastic advocate!

Melani Roberson, Senior Strategy and Innovation Analyst

IDEAWAVE WELCOME MESSAGE FROM CHANCELLOR KHOSLA:

"During the Strategic Planning process we received valuable input from over 10,000 members of the UC San Diego community that helped to inform the entire Strategic Plan. Let's continue this open, collaborative dialogue using IdeaWave – a tool that leverages the collective genius of campus to identify and further develop ideas that will allow us to achieve the Goals of the Strategic Plan.

In IdeaWave, I am asking you to focus your entrepreneurial spirit and penchant for collaboration on how UC San Diego can create an agile and innovative infrastructure that delivers outstanding support to our mission and maximizes our regional and global impact. Please contribute concrete, actionable and bold ideas that will help us identify, develop and implement innovative new approaches to adapt to a changing world and to enable our faculty, researchers, students and staff to develop a broad skill set and focus their efforts on producing outstanding students, research, clinical care and service. Join us as we continue the efforts started by our visionary founders, and redefine the future of education and research at a public university.

I thank you for your contributions and look forward to seeing you in IdeaWave!"

Welcome message in IdeaWave from Chancellor Pradeep K. Khosla, Chancellor, UC San Diego

DECISION MAKING

How ideas will be judged, selected, and improved. Who is involved, and what criteria and process should be used.

The Enterprise 'community graduation' feature is used with idea campaigns, to set a minimum threshold score for ideas to move to a review phase. Commenting is given a high value for the scoring because it is through discussion that root causes are most likely to be discovered.

The review criteria for idea campaigns is set up before launching, and can be unique per campaign, as long as they adhere to some guidelines - for example, if there is potentially any negative impact on the strategic plan, or the community values on the campus. In that case, the OSI team will step in to have a discussion, and potentially change the focus and scoring.

Because the program is still in an early stage, the OSI team will review all ideas checking that the criteria and graduation thresholds make sense in each idea campaign, and that good ideas are not being missed by the process.

Additionally, the evaluation teams are given wildcard picks, meaning they can select ideas, which have not met the predetermined community thresholds, but are determined by evaluators as meeting key criteria and as such are moved forward for additional review and discussion.

In the initial campaigns OSI has mainly seen ideas that allowed for quick wins, with smaller operational improvements that were relatively easy to implement. It's expected that future campaigns will drive robust solutions that require concept teams to develop and further build out ideas. This is where opportunities with corporations will become important, with the ability to take a series of concepts, and allow external groups to come in and work on those concepts with the researchers to create truly innovative solutions to take to market (see Sidebar: Collaboration with business and institutions).

The five primary stages of an idea (drafting, commenting, hot, evaluation, selected)

> **We see many opportunities to collaborate on big blockbuster idea campaigns, looking at game changing innovations. It will allow the correct people to see the work researchers are doing now in areas relevant to each collaborator instead of waiting up to two years for a research paper to be published after the invention is out, and maybe the correct person reads the published paper, or maybe they don't. This is a much more proactive approach to finding and aligning opportunities with new research.**
>
> Bob Neuhard, Executive Director

EXECUTION

How ideas are iterated upon and developed towards implementation.

With the operational ideas so far, execution has mostly been straightforward. A manual process is in place to check and update the status of ideas being implemented. Selected ideas must be designated as either a quick win, a concept, or a project. As more concepts and projects begin to appear, the goal is to have an easy to manage portfolio of ideas which are worked on throughout the university. This is where an automation process needs to be added for the status of the ideas, as a manual one will no longer scale.

A key learning from the initial campaigns has been to ensure that those responsible for implementing projects from the ideas, are included in the campaign preparations.

In some cases, the project teams were not involved, so handing over the ideas at the end of the campaign was not a smooth process. This is where traction was often lost, and communication around idea progress became more difficult.

Since then, the process was adjusted to include the project teams right from the start. A campaign planning guide has since been created, which takes the campaign manager through necessary steps, from definition and launch, moderation and facilitation, to closure and post-campaign activities. As campaigns close, feedback is provided, so that the planning guide can be continuously updated with new learnings.

> We've created what I refer to as our consulting guide. Every time I talk with our potential customers and partners I pull out the guide and can show them tangible examples from past campaigns of not only marketing materials and communications, but also campaign descriptions, timelines, and helpful resources to understand the overall process.

Melani Roberson, Senior Strategy and Innovation Analyst

Implementation Example: Performance Appraisal Campaign

In 2015, Human Resources sponsored an IdeaWave campaign aimed at gathering ideas for simplifying, standardizing, and streamlining the performance appraisal process. Around 80 ideas were submitted by University staff. Through the evaluation process, it was determined that in order to standardize the process an electronic tool should be adopted campus wide for the purpose of centralizing the entire performance appraisal process and creating one system, tool and format to drive consistency and reduce numerous hard and soft costs. This was turned into a full project and process redesign commenced. In 2017 a new electronic performance appraisal form is going "live" and it will serve as the central system of record going forward for all performance appraisals.

The impact of this project is significant across many areas. For example, the impact on the cost of complying with the annual audit conducted by central Human Resources will be greatly reduced. Prior to this effort, every year, due to the decentralized and non-standardized process it took 2-3 people several weeks to gather the data on performance appraisal compliance from all of the various departmental units. Now that information will be available with a few clicks of a button.

" Wherever you go, people are always asked for their ideas. But often, nothing happens or one idea moves forward and the rest are lost in a "parking lot", and people start to disengage. We were really concerned with this, and wanted to pace ourselves in a way that ensured outcomes were happening, and people could see it.

Bob Neuhard, Executive Director

MEASUREMENTS

What KPIs are important to measure, and how you can track and judge success over time?

The early stage metrics for the OSI team were around the levels of awareness of the program, the satisfaction of the stakeholders for campaigns, and the quality and depth of the collaboration. Their main concern was to handle the output effectively, not so much the mere number of campaigns and submitted ideas.

Awareness was important, because people needed to know that IdeaWave existed, and that it was linked to the strategic planning document - it wasn't another idea suggestion box, but a sustainable approach to continuing the work of the strategic plan. Campaigns generated a tremendous interest, typically with 30,000+ views, which was higher than expected. The OSI team acknowledged that views will not be a key metric later down the line, as the attention turns towards measuring the results from a portfolio of ideas.

Satisfaction with the idea campaigns is measured by sitting down with the sponsors, and gauging their response to the results and process. Furthermore, the Chancellor continues to remain involved at a high level. The OSI team is able to determine in a qualitative way if they are getting the outcomes they want with the platform and the process. As the program, leadership, and processes evolve, adjustments are made to subsequent campaigns.

The level of collaboration is monitored throughout the campaign lifecycle, and reports are generated from the platform and shared with stakeholders. A key metric is the ratio of invitees versus those that have viewed and/or participated in the campaign. OSI has witnessed a range of participation:

- For the parking campaign, more than 65,000 participants were invited to participate and over 1,000 either submitted an idea or participated by commenting and voting. With this large of a population this equates to around a 1% participation rate.
- On the flip side, the NSF INCLUDES campaign had around 175 campaign invitees and a 40% participation rate.

Typically, what is observed is that the smaller and more focused the topic, the more evidence of increased participation rates. In addition, the ability to email the entire campus wide community is constrained due to mass emailing policies, so it is also evident that while email reminders out to the invitees helps to increase participation, frequent email communications are not always possible with the larger target audience campaigns.

The OSI team will help moderate to increase the focus on commenting on existing ideas, and tailor the communications, by sending targeted emails to the campaign management team to reach out to their teams to engage in the campaign. There is also a push toward helping individual contributors understand the value of advancing their own ideas through the platform, which is a part of the process that needs to be better understood by campaign participants.

"

In terms of ROI on IdeaWave, we can easily show just from the initial projects that it's paid for itself many times over. But this is not the way we are looking at it, rather this is about better ways of working, better ways to function operationally, better ways to share best practices and information that just isn't shared widely today. It's an essential component for our goals around dialogue and collaboration.

Bob Neuhard, Executive Director

FROM CROWDSOURCING TO COLLECTIVE IMPACT

We have recently begun to reshape the conversation on campus and reframe it as "collective impact."

When we launched the program we had to differentiate and explain how crowdsourcing applied to higher education and operational initiatives. As we progressed over the past year and a half, it became clear that what we had was a collective impact program, and OSI was a backbone organization for innovation as well as for complex strategic initiatives. For example, the NSF Includes conference was specifically framed around the concept of "collective impact" and the resulting concepts extrapolated on key underpinnings for "collective impact" in STEM.

- Approximately 175 campaign invitees
- Campaign generated 41 ideas
- 41 ideas translated into 10 major themes for conference topics
- 10 major themes became the basis for 10 concept teams that worked together through the 3 day conference (see image below of the workgroup titles).
- Details and solutions provided by the concept teams were evaluated based on the following criteria: impact, feasibility, and urgency.
- Around 60% of the solutions proposed will be detailed to the NSF in the final report as well as detailing the entire process from start to finish.

COLLABORATION WITH BUSINESS AND INSTITUTIONS

" A group of external and expert reviewers might say, 'if we had a working prototype of this, it could be exactly what we need'. They can go back to the research group, provide the funding from the review team, and get the prototype made. The review team then might have the first right of refusal on the outcome. You can also have a situation where one institution has space, but no money; another has money, but no resources. We can bring them together around a particular theme, and have them partner up on inventions. It's about digitizing the process, making it more collaborative, and bringing interested parties together on the topical themes they care about.

Bob Neuhard, Executive Director

Bob Neuhard, Executive Director for the Office of Strategic Initiatives at UC San Diego, has a vision to open up IdeaWave to multiple parties, including additional research institutions and businesses who want to engage on game changing innovations with UC San Diego researchers. Today, for example, when an invention is filed, a tech transfer group would normally look for opportunities with entities that might be interested, typically working with a known list, and if a match is not made, the invention may sit there unused.

Using IdeaWave, the idea is for each participating institution to submit a summary of each of their discoveries, organized under various research themes, such as wearable sensors and cancer targets. They are then logged into an IdeaWave tenant, acting like an intelligent library, with mechanisms to find similar content and complimentary research, highlighting potential areas for synergistic inventions, as well as allowing for researchers and external parties to search for collaborators in relevant areas.

A review team would be composed for each thematic area, comprised of researchers with expertise in the field, experts from industry, and experts in venture funding. Between them, they would review recommended matches and discoveries, and align them with needs - seeking to find a combination of pieces which constitute the next wave of innovation in a particular field.

ADVICE FOR INNOVATION MANAGERS IN HIGHER EDUCATION

1

You can have success if you start big or you start small. You don't need the Chancellor or President to be your Sponsor, **what you need is the right level of sponsorship for the topic(s) you are addressing.** If the sponsor is able to take action and implement ideas, then you are well on your way to a successful campaign.

2

Don't use technology to automate a broken process... it just breaks faster. Your goal isn't to have the fastest broken process but to automate optimized processes to create scale and transparency, while improving collaboration and outcomes.

3

Innovation programs are change programs. From "processes" to "people," take some time to think about the "people" aspect of the program. Take care of the basics of managing a campaign like ensuring sponsors and campaign managers know their role for a particular campaign, and take time to understand how idea crowdsourcing will enable and energize many people while at the same time cause concern with some that have flourished in a more hierarchical model.

4

Top down enablement with crowd-up solutions. Sounds scary, but don't worry, because while crowdsourcing shifts the organizational dynamic and flattens hierarchies, it does so at the request of the campaign sponsor. By that I mean a campaign sponsor (top) is actively looking for input, so they are inviting the disruption of their own power paradigm in order to find the best ideas from across a department or an entire campus, or the community (crowd-up), they desire to accelerate the identification of ideas, gain acceptance around ideas, and implement better, broadly supported solutions faster.

5

This sounds so different but you already do it. **You already do crowdsourcing,** just not at this scale or with the range of capabilities and impact that we are talking about with an enabling technology platform. Focus groups, town halls, and even team meetings are a form of crowdsourcing, maybe not as big or diverse as can be done through a platform like HYPE Enterprise, but they are a form of crowdsourcing. Once you have the people and process aspects in place implementing HYPE is really a way to scale collaboration, create transparency, accelerate the idea to implementation process, and amplify impacts.

6

You will be surprised by how quickly you find new "use" cases for problem solving, like process efficiency and cost savings, to discovery of unique capabilities and best practices, to improving customer, patient, student, and community experience. Another very successful use case is having project teams use the platform for project specific outreach to a large group(s) or the entire campus, to get wide ranging input on an aspect of a project, test a hypothesis, or collaborate with a subset of campus to crowdsource solutions to an issue that the project team is facing.

7

Campaigns are key. Campaigns are the call to action, the nexus of what you are asking people to collaborate on and as such they set the scope of discussions and ensure alignment to strategy and goals. A well drafted campaign helps to ensure the success of the crowdsourcing effort.

8

Communicate engagement, successes, actions taken, status, and even challenges. The people that engaged with you did so with the hope that their ideas and those they commented and/or voted on would be seen, considered, and potentially be implemented. They don't expect everything to be done, especially if you did some expectation setting as part of the campaign, but they are taking time at your request to provide input to something that matters to you as a campaign sponsor. A lack of response or communication can negatively impact future participation on campaigns. Even if you implement an idea or multiple ideas from a campaign, you need to communicate those actions as many people may not know what was done or that it stemmed from the campaign.

Luckily, HYPE helps with that communication and will automatically update the status for ideas as they progress from idea to implementation, informing those that want to know what is happening. That being said, the campaign manager and innovation lead should compile and communicate relevant updates in a consistent and strategic manner to not overwhelm participants but to energize and also attract the bystanders that have not yet engaged.

9

Set expectations and take action. Make it clear for each campaign what you plan to do with the input you receive. If you are just collecting input for informational purposes, with no current plan to implement any of the input, let people know that is the purpose of the campaign. On the contrary, if you know you will be implementing ideas after the campaign closes, let people know that as well. By setting the expectations up front people know what their role is as a participant and what to expect from the sponsor, which goes a long way towards participant satisfaction. By take action I mean live up to the expectations you set, as well as to communicate the status of where you are as it relates to those expectations.

About UC San Diego

At the University of California San Diego, we constantly push boundaries and challenge expectations. Established in 1960, UC San Diego has been shaped by exceptional scholars who aren't afraid to take risks and redefine conventional wisdom. Today, as one of the top 15 research universities in the world, we are driving innovation and change to advance society, propel economic growth and make our world a better place.

UC San Diego's main campus is located near the Pacific Ocean on 1,200 acres of coastal woodland in La Jolla, California. The campus sits on land formerly inhabited by Kumeyaay tribal members, the original native inhabitants of San Diego County. UC San Diego's rich academic portfolio includes six undergraduate colleges, five academic divisions and five graduate and professional schools.

http://ucsd.edu/

About HYPE Innovation

HYPE Innovation is a global leader in full-lifecycle innovation management software. HYPE's powerful platform allows organizations to engage thousands of employees in idea generation and collaborative problem solving. Our client community includes global companies such as Bombardier, Nokia, Merck, Airbus, AkzoNobel, Saudi Aramco, Liberty Global, Petronas, and Deutsche Post DHL.

http://hypeinnovation.com

LEARN MORE ABOUT INNOVATION PROGRAMS, POWERED BY HYPE

Airbus

Airbus is one of the world's foremost aerospace companies, with 133,000 employees, manufacturing sites in France, Germany, Spain, UK, US, and China, and revenues of €43 billion.

In 2010, Tom Enders, CEO at the time, initiated an effort to increase and structure innovation activities around an end-to-end innovation process. This led to the creation of the Airbus Innovation Cell, a team dedicated to fueling the innovation engine with ideas, deploying an efficient process, and delivering results through innovation.

In this case study, we look at how Airbus has created a successful and sustainable organization-wide platform for innovation management.

Download

Liberty Global

Liberty Global is the world's largest international cable company with brand names such as Virgin Media, Ziggo, Unitymedia and Telenet, revenues of $18.3 billion and 27.4 million customers across 14 countries.

For a company of this size and breadth, how do you create cross-divisional collaboration and sharing of ideas to help fuel innovation?

In this case study, we look at how Liberty Global has met this challenge with its approach to collaborative innovation, creating a global platform with HYPE Innovation, that is tightly aligned with corporate strategy, and generating tangible results.

Download

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