

# UBC: Benchmarking and Best Practices Primer

*June 1, 2023*

# Today's Discussion

---

What is a Benchmark and Best Practice Analysis?

Why do it?

Benchmark &  
Best Practice  
Analysis

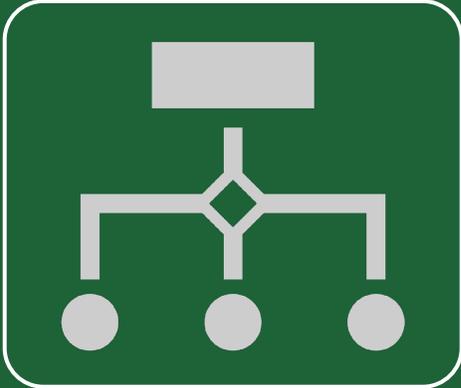
How is it completed?

Tips and Tricks

# What is a Benchmark and Best Practice Analysis?



# Benchmark and Best Practice Analysis



A benchmark analysis compares an organization's structure, processes, tool usage and / or performance metrics to similar organizations.



The essence of a benchmark analysis is the process of identifying the highest standards of excellence – commonly called “best practices.”

# Benchmark and Best Practice Analysis

## WHY?

- Learn from experience and advice of other institutions
- Identify common practices and pitfalls
- Focus in on best practices in support of your goals
- Discover interesting innovations

## HOW?

- Clearly define the analysis focus
- Select relevant benchmark institutions
- Collect information – both orally and written
- Identify best practices

## OUTCOMES?

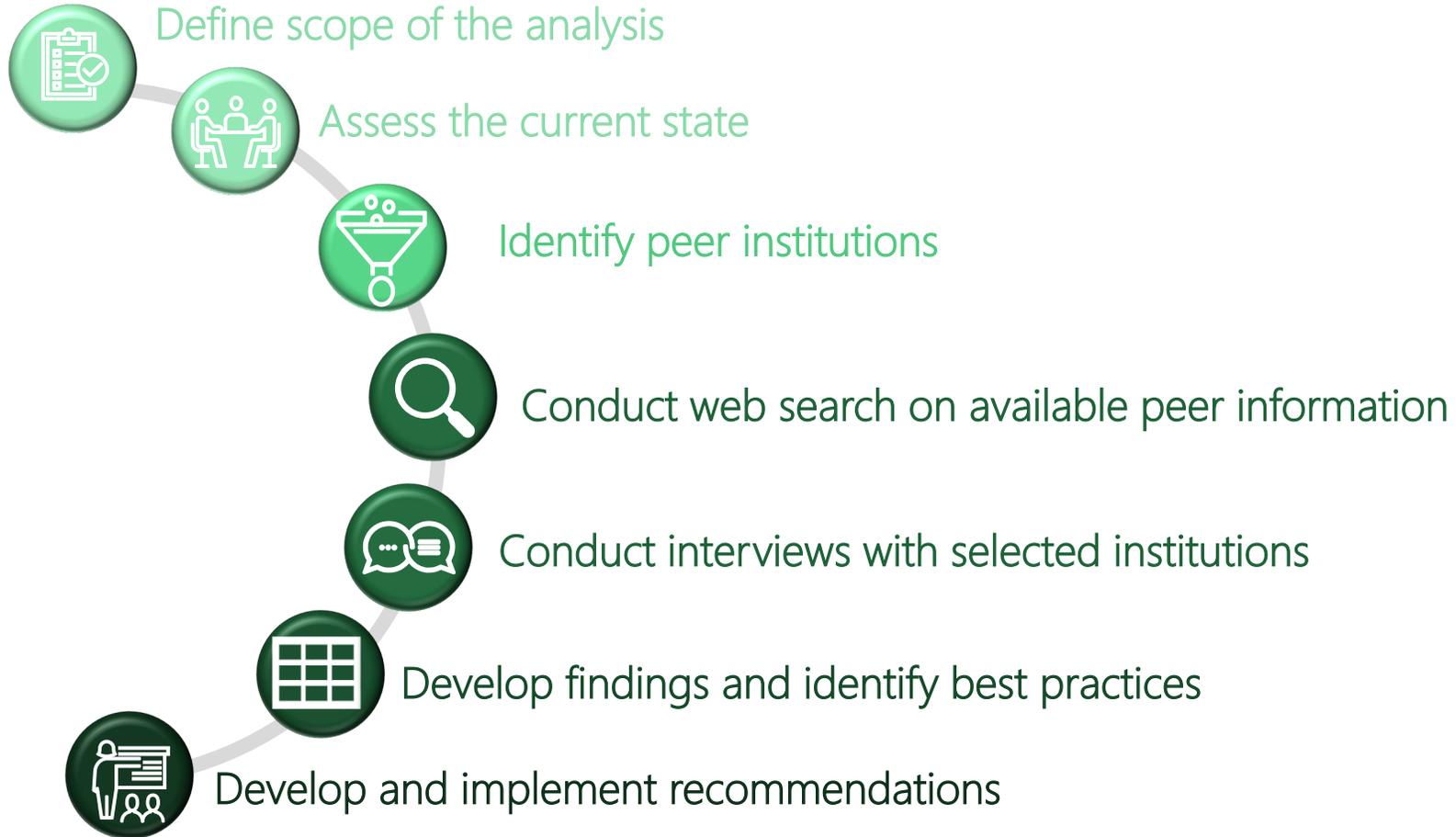
- Recommendations for institution
- Performance improvement
- Increased efficiencies
- Improved customer service
- New connections / relationships with other universities

# Benchmark and Best Practice Primer



# Approach

---





# Define Scope of Analysis

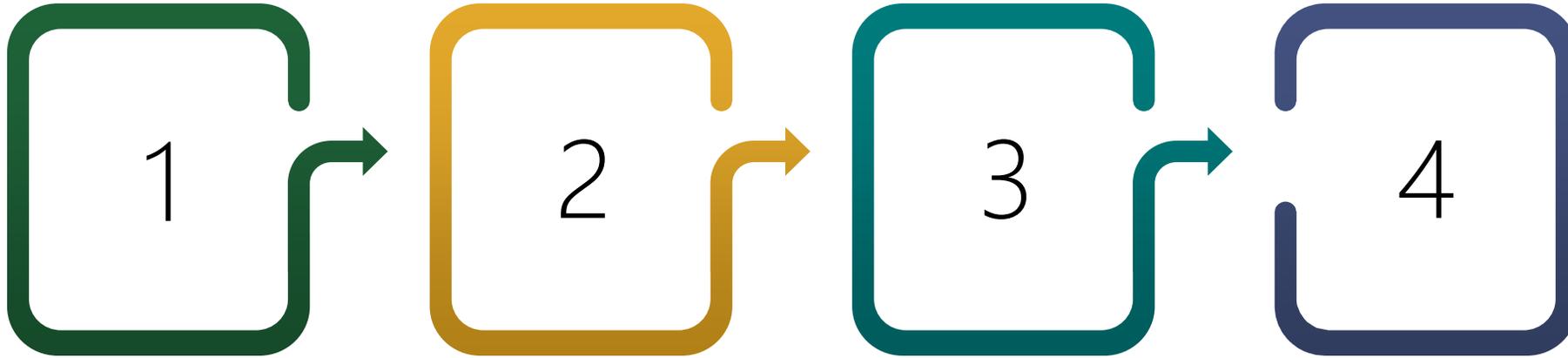
## Scope may be broad or specific

- Assessment of an existing program
- Usage of a specific tool or technology
- Assessing a potential new program

## Clearly define what you are benchmarking

- What's being assessed?
- Which functions, organizations, processes, and/or technology/tools will you benchmark?
- What questions are you trying to answer?

# Assess the Current State



## GATHER AND REVIEW EXISTING INFORMATION

- Organizational charts
- Process documentation
- Standard operation procedures
- Existing metrics

## IDENTIFY KEY STAKEHOLDERS

- Staff
- "Customers"
- Senior Leadership
- External Stakeholders

## DEVELOP AND EXECUTE INTERVIEW STRATEGY

- Develop collection method
  - Individual vs. working group sessions
  - Surveys
- Develop interview /session guides or surveys

## DRAFT CURRENT STATE ASSESSMENT

- What is currently working well?
- What are the existing challenges?
- Identify overall observations and insights
- Identify themes

# Example Current State Assessment



General Subject Area	Insight
Strategy	The <b>Gardens &amp; Greenhouse (G&amp;G)</b> Program would benefit from clearly documented goals and objectives.
Value	The G&G Program delivers great value to students and the University as a whole, but significantly less to faculty and staff.
Awareness	Awareness of the G&G Program varies, being highest among students involved with the Program and lowest among faculty and staff.
Organizational Structure	The G&G Program has a natural home under Sustainability.
Internal Communication	The G&G Program and Facilities (Grounds) would benefit from improved communications between offices to increase understanding goals and objectives and how they can best support each other.
Staffing	The G&G Program faces staffing challenges.
Financial Structure	Mason is very much like its peers in terms of its sources of support and the scale and scope of its revenue generating activities.
Impact	The G&G Program could deliver even greater value to students through a relationship with the Patriot Pantry, which would require some additional effort and investment.

# Define Criteria for Identifying Peers



Determine the types of organizations to benchmark against

Similar in size or other relevant metrics

Other Public Universities  
– US or VA

University Carnegie Status

SCHEV list of Identified Peers

Known innovators in subject

Web research

Enrollment

Structure

Budget size

Location

Physical campuses

# Example UBC Benchmarking Criteria

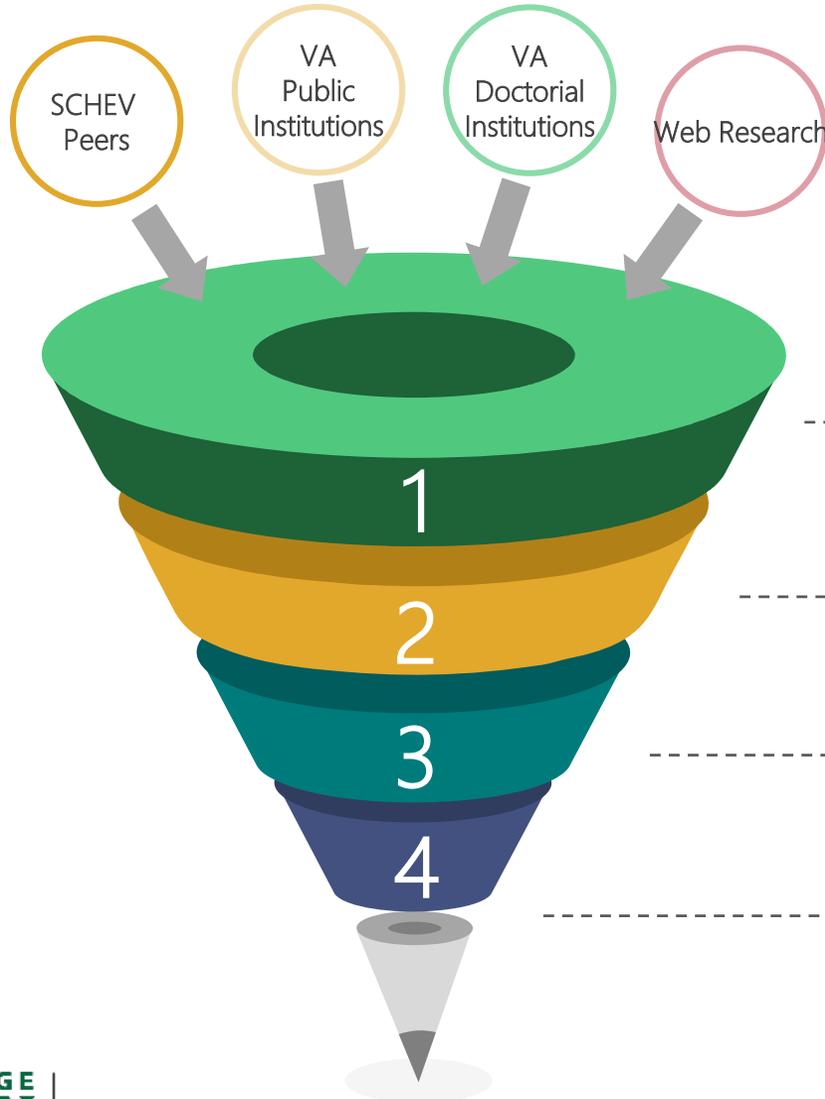


Criteria	Description
Located in Virginia	The university is a Virginia institution
Located in DMV area	The university is in the greater DMV area
Similar size/mission institution	The university is a similar size and complexity in areas, such as: <ul style="list-style-type: none"><li>• State appropriations</li><li>• Research expenditures</li><li>• R1 designation</li><li>• Enrollment, etc.</li></ul>
Public/Private	In general, we are usually looking to compare with other public universities, but in some cases, it makes sense to look at private institutions
Similar Process or Organization	The university has a similar process or organization
Access to information	Publicly available information or institution contact willing to meet
Similar systems	The university uses similar core systems (e.g., Banner, Salesforce, etc.)

# Cast a Wide Net



# Narrowing the Field



## **BENCHMARKING POOL**

Start by casting the net wide, identifying a set of potential benchmark institutions, curated from potential sources: *SCHEV peers, VA Public Institutions, VA Doctorial Institutions, and Literature Reviews*

## **CARNEGIE CLASSIFICATION**

Identify institutions with similar research and enrollment focus as GMU.

## **SIZE OF INSTITUTION**

To evaluate institutions of similar size to Mason, you can use Enrollment, Staff Size, Residential population, etc. as factors.

## **PUBLIC OR PRIVATE**

It's more valuable for Mason to benchmark ourselves against other public institutions. Virginia public institutions are more favorable as well. However, sometimes it makes sense to include a Private Institution given an innovative approach or to have enough peers.

# Mason SCHEV Peers

## SCHEV Approved Peer Groups for George Mason University

Institution	State	Type
Arizona State University at the Tempe Campus	AZ	Public
Boston University	MA	Private
Florida State University	FL	Public
George Washington University	DC	Private
Michigan State University	MI	Public
New York University	NY	Private
North Carolina State University at Raleigh	NC	Public
Northeastern University	MA	Private
Rutgers University-New Brunswick/Piscataway	NJ	Public
Stony Brook University	NY	Public
SUNY at Albany	NY	Public
Syracuse University	NY	Private
Temple University	PA	Public
University of Arizona	AZ	Public
University of Connecticut	CT	Public
University of Florida	FL	Public
University of Illinois at Urbana-Champaign	IL	Public
University of Kansas Main Campus	KS	Public
University of Maryland-College Park	MD	Public
University of Massachusetts-Amherst	MA	Public
University of Minnesota-Twin Cities	MN	Public
University of Nebraska at Lincoln	NE	Public
University of North Carolina at Chapel Hill	NC	Public
University of Southern California	CA	Private
University of Washington-Seattle Campus	WA	Public





# Carnegie Classification

## GEORGE MASON UNIVERSITY



Fairfax, VA



Year or above



Public

**38,541**

Students (Fall 2020)

Search for Institutions with the same classification(s) by selecting the checkbox next to the classification or click the classification to view the methodology.

0 Selected

**FIND SIMILAR**

BASIC

[Doctoral Universities:  
Very High Research Activity](#)

COMMUNITY ENGAGEMENT

[Not Classified](#)

UNDERGRADUATE INSTRUCTIONAL PROGRAM

[Balanced Arts & Sciences/Professions, High  
Graduate Coexistence](#)

GRADUATE INSTRUCTIONAL PROGRAM

[Research Doctoral:  
Comprehensive Programs;  
No Medical/Veterinary School](#)

ENROLLMENT PROFILE

[High Undergraduate](#)

UNDERGRADUATE PROFILE

[Four-Year, Full-Time, Selective, Higher Transfer-  
In](#)



# VA Public Institutions

Institution	Website
Christopher Newport University	<a href="http://www.cnu.edu">www.cnu.edu</a>
George Mason University	<a href="http://www.gmu.edu">www.gmu.edu</a>
James Madison University	<a href="http://www.jmu.edu">www.jmu.edu</a>
Longwood University	<a href="http://www.longwood.edu">www.longwood.edu</a>
Norfolk State University	<a href="http://www.nsu.edu">www.nsu.edu</a>
Old Dominion University	<a href="http://www.odu.edu">www.odu.edu</a>
Radford University	<a href="http://www.radford.edu">www.radford.edu</a>
University of Mary Washington	<a href="http://www.umw.edu">www.umw.edu</a>
University of Virginia	<a href="http://www.virginia.edu">www.virginia.edu</a>
University of Virginia's College at Wise	<a href="http://www.uvawise.edu">www.uvawise.edu</a>
Virginia Commonwealth University	<a href="http://www.vcu.edu">www.vcu.edu</a>
Virginia Military Institute	<a href="http://www.vmi.edu">www.vmi.edu</a>
Virginia State University	<a href="http://www.vsu.edu">www.vsu.edu</a>
Virginia Tech	<a href="http://www.vt.edu">www.vt.edu</a>
William & Mary	<a href="http://www.wm.edu">www.wm.edu</a>

# Conduct Web Search



## Develop a baseline understanding using publicly available Information

- Web searches – put on your best research hat and find all information readily available
- Allows you to focus your interview / work session time on filling in the gaps and getting human perspectives
- Consider using ChatGPT or other AI search tools for harder to find facts *-think of these tools as you would a good intern – i.e., results need to be reviewed and validated*
- Organize your data collection in an easy to read matrix
- Consider sending to interviewees prior to meeting to confirm accuracy



## Determine if there are documented Best Practices in the study area

- Many higher education topics have documented best practices
- If applicable, find best sources for your study and include as part of the analysis
- Typically found via web search



# Conduct Interviews

## Identify individuals to interview

- Higher Education institutions are collaborative by nature and typically receptive to participate
- Identify contacts within department
- Typically takes a few "hops" to get the right person

## Develop Interview Guide (see appendix for template)

- Purpose of the interviews is to gather insights not available publicly
- Confirm your current understanding of their environment
- Start with key pieces of information you need: software using, size of organization / staff, etc.
- Next, dive into insight questions
  - *In your opinion, what are the best practices in this area? Who is doing this well?*
  - *What are challenges your team has faced and how did you address them?*
  - *What do you wish you could change about X at your institution?*
- Remember, this is just a guide; follow the conversation
- Ideal to share discussion topics prior to the interview
- Questions often evolve from the first to the last interview



# Interview Guide

Interview Guide	Name of Institution A, B, C, etc.
Confirm Current Understanding (from internet research)	
Key Insights	
In your opinion, what are the best practices in this area? Who is doing this well?	
What are the programs current challenges?	
What are challenges your team has faced and how were they addressed? Was this effective?	
What do you wish you could change about X at your institution?	
What are some of your lessons learned? or what would you do differently if you could?	
If you were starting from scratch, how would you approach this?	
What are key relationships for your program?	
How do you measure performance?	
Any other advice you have for us?	
Closing	

# Example Benchmark Documentation



## Greenhouse and Gardens Benchmark Data

School	Academic Activities	Community Outreach and Engagement	Student Involvement
Mason	Hosted thousands of students and supported thousands of service hours	Connects with local schools; Food Forest open to public; limits on entrepreneurial activity	Hosted thousands of volunteers and supported thousands of volunteer hours
ASU	Data not readily available	Runs a farmers' market and donates to the local food banks	Student gardening clubs; maintain Herb Garden; student interns oversee harvest volunteers
Duke	Provides hands-on, sustainable agriculture education and experiential, field-based training	Community Supported Agriculture model feeds over 100 community members	Student Farm begun by a student; 5 to 7 students volunteer 6 to 10 hours per week for a year
GW	Supports several courses in transdisciplinary Sustainably minor (largest undergrad minor)	Makes significant food donations to Miriam's Kitchen, a non-profit focused on homelessness	Garden is entirely student run; volunteers support composting efforts
Rutgers	Committed to experiential learning with dedicated space for student-driven activities	Serves as an agricultural resource to NJ; looking to increase public engagement and outreach	Seeks to engage and offer experiences to students looking to make environmental change
UMD	Supports several courses with service requirements; working to raise academic profile	Provided some community education; rented garden plots (pre-COVID)	Garden started by graduate student; receives 7-8K volunteer hours per year, 90% from students
UVA	Offer internships, weekly workdays, class visits, and student academic projects	Runs UVA Market Days (farmers' market) and weekly farm share; donates to local nonprofits fight hunger locally	Garden created by a student; Morven Summer Institute offer project-based works; students participate in all aspects of the CSA
VT	Have ~25 students come through each year; supports graduate student projects	Serves as a bridge among VT, Virginia's vegetable growers, and the local community	Students and Dining work on meals; volunteers provided labor when a class was cancelled
W&L	Supports courses with service-learning requirements; works with capstone projects	Supplies Campus Kitchen; connects with local schools; donates to local food bank	Volunteering opportunities advertised via list that lets students to connect with projects of interest

# Identify Findings and Best Practices



Themes / insights will emerge as you complete the analysis

Identify innovations

Categorize:

- Observations
- Insights
- Best Practices
- Innovations
- Recommendations



# Make Recommendations



# Tips and Tricks

## UTILIZE YOUR NETWORK -LEVERAGE WHO YOU KNOW

- Within George Mason
- Higher education colleagues – from work at other institutions or those you met at conferences
- Ask vendor for client contacts and introduction
- Network between institutions
- LinkedIn

## ESTABLISH RULES OF ENGAGEMENT

- Factual data will be summarized in tabular form
- No one will be quoted by name in findings

## SHARE APPLICABLE RESULTS WITH INTERVIEWEES

- Gives them something back for their participation
- Include overall findings



## PEER REVIEWS ARE SIMILAR TO THESE ANALYSES AND ARE APPLICABLE IN SOME CASES

- Identify Peer Reviewers that are Subject Matter Experts (SMEs) in the study area
- Peer Reviewers conduct interviews / focus groups on current state
- Make recommendations based on their experience in the area

**ITERATE AS YOU GO**

**ALWAYS ASK "WHY?"**

## KEEP A RUNNING LIST

- Of Innovations
- Emerging Themes
- Emerging Best Practices
- Potential Recommendations

# UBC Summer Series: Next Sessions

---



## **Pitching and Presentation Best Practices**

July 13, 2023 @ 12 pm



## **Change Management Primer**

August 10, 2023 @ 12 pm

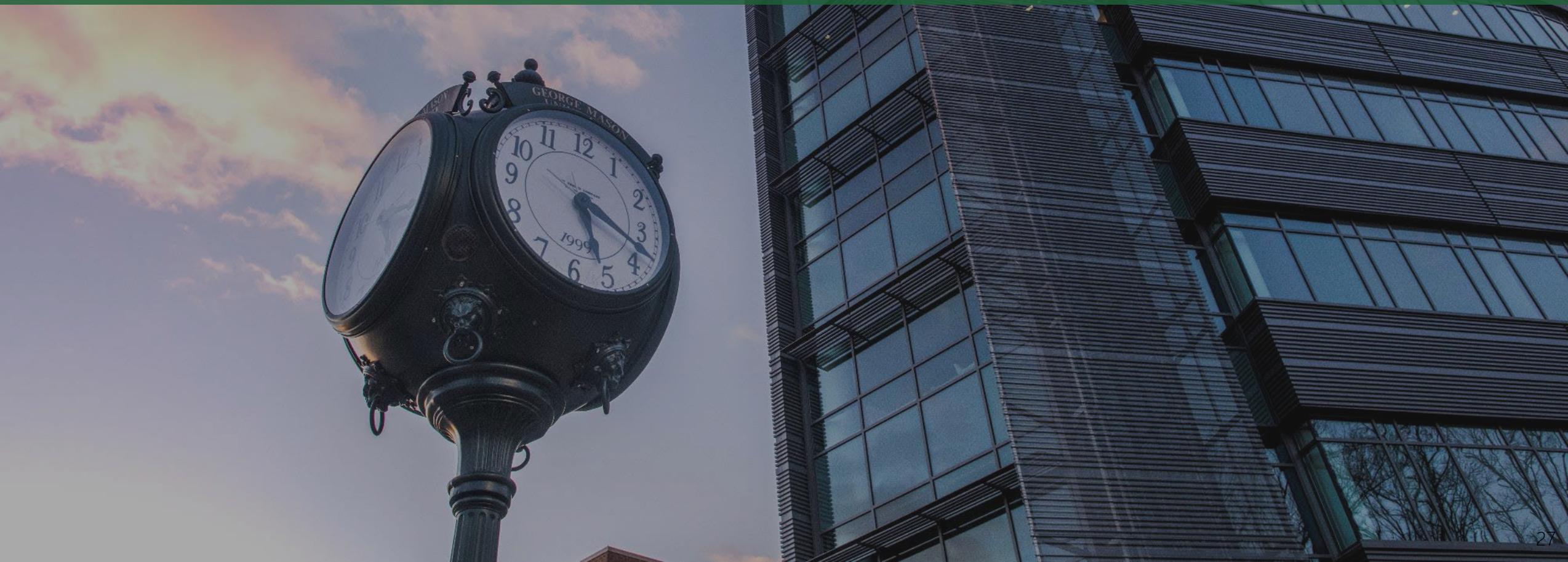
# Questions and Discussion

Email: [UBC@GMU.edu](mailto:UBC@GMU.edu)

Website: [consulting.GMU.edu](http://consulting.GMU.edu)

Please provide feedback on this presentation

# Appendix: Benchmarking Template



# Web-Based Market Research

Current State	Name of Institution
Program Overview	
Program History, if appropriate	
Program Goals, Vision and Mission	
Program Primary Functions	
Organizational Structure: How is the office structured? Who do they report to?	
Details on Staffing - number and type of positions	
Who are the internal and external stakeholders?	
Overview of Expenses and Revenues	
Technology Usage	
Program Metrics (size, etc.)	
Performance Measures and Data	
Relevant External Organizations?	

# Interview Guide

Interview Guide	Name of Institution A, B, C, etc.
<b>Confirm Current Understanding (from internet research)</b>	
Confirm accuracy of your source(s) (in case the internet information is out of date; if it is, you'll need to ask for what has changed)	
Based on your research, fill in holes in these areas:	
Overview of program's components and operations	
Organizational structure both within org and reporting structure	
How is the program supported financially? Does the program generate revenue? If so, from what sources? Is the program self-sustaining? If so, how did it get to be that way?	
Key functions / processes of the program	
How and what technology is used?	
Any relevant external organizations?	

# Interview Guide

Interview Guide	Name of Institution A, B, C, etc.
<b>Key Insights</b>	
In your opinion, what are the best practices in this area? Who is doing this well?	
What are the programs current challenges?	
What are challenges your team has faced and how were they addressed? Was this effective?	
What do you wish you could change about X at your institution?	
What are some of your lessons learned? or what would you do differently if you could?	
If you were starting from scratch, how would you approach this?	
What are key relationships for your program?	
How do you measure performance?	
Any other advice you have for us?	
<b>Closing</b>	
Would you be willing to send us copies of X, Y, and Z (e.g., sample job descriptions, diagrams of processes, any documentation, etc.)	
Can we follow up with additional questions?	
We will share a summarized version of our results with you after the analysis is complete	





# Insights

Key Areas	Insight
Strategy	
Value	
Awareness	
Organizational Structure	
Internal Communications	
Technology	
Staffing	
Financial Structure	
Impact	

# Recommendations

Key Areas	Insight
Strategy	
Value	
Awareness	
Organizational Structure	
Internal Communications	
Technology	
Staffing	
Financial Structure	
Impact	