

Administrative Unit Name: _____

Please complete this Word document and the accompanying Excel workbook (both of which were provided to your unit via email), and submit them to the Office of Planning & Budgeting (OPB) on or before **Thursday, February 1, 2018**.

Please email your materials to [Jason Campbell](#).

Please note that the responses you provide in this Word document **will** be posted to the OPB website.

1. What is the programmatic vitality of your unit?

Please provide both quantitative and qualitative information, leveraging published materials and [previous submissions](#) where possible. In your response to this question, you may wish to include responses to some or all of the following prompts. Please note that these are suggestions, not requirements.

- What are the top 3-5 strategic goals of your unit? Could any of these goals increase expenditures or decrease revenue for other units?
- What is your unit doing to effectively use resources in a way that benefits your unit and/or other units outside of our own?
- Please describe your unit’s emerging or changing personnel needs—prompted by changes that either your unit or the institution is facing—and what your unit will do to meet these needs *without* creating new FTE positions (e.g. redeploying FTE among other functional areas).

Please respond in 500 words or fewer and please use bullets, rather than dense prose.

Strategic Goals

UW-FA leadership team developed Year-1 and Year-2 implementing objectives to meet Strategic Goals:

1. Create an administrative culture where each individual is empowered, service-oriented, ethical, and accountable.

Build skills/capacity through staff development, succession planning and training	<ul style="list-style-type: none"> • Baseline/train employees on accountability, ethics, internal controls, compliance, privacy, & risk management • Develop/implement succession planning strategy
Engage all staff in continuous improvement	<ul style="list-style-type: none"> • Prioritize organizational/process improvement efforts—Lean, TAP • Increase engagement through Lean and Strategic Consulting • Implement robust performance management
Support the University’s diversity objectives	<ul style="list-style-type: none"> • Increase campus outreach to increase spend with diverse firms

2. Establish robust financial management based upon people, processes, and systems; a keystone of UW Administration

Align/build financial competencies across UW	<ul style="list-style-type: none"> • Develop common financial language across UW • Deliver core training for finance professionals • Implement matrixed accountability strategy • Enhance collaboration in designing financial systems and processes
Integrate efficient processes with new systems	<ul style="list-style-type: none"> • Enhance/streamline key processes—strategic/operational planning, budgeting, funds management, performance monitoring, forecasting • Establish contracting department

3. Implement enterprise systems that are cost-effective, as one of the enabling foundations for UW’s success.

Invest in infrastructure	<ul style="list-style-type: none"> • Support ISC stabilization • Complete FT initial planning phase • Improve cybersecurity/access management
Advance data-driven environment	<ul style="list-style-type: none"> • Develop University-wide data strategy • Champion data-based decision-making
Integrate efficient processes with new systems	<ul style="list-style-type: none"> • Streamline processes—UW Connect, FT readiness • Complete T2 implementation in Parking • Improve compliance areas, e.g., public records requests

4. Drive integrated management as key principle for designing, building and maintaining UW’s physical/built and related digital and virtual environments.

Optimize capital resources and physical assets	<ul style="list-style-type: none"> • Integrate CPD and FS under VP • Adopt integrated TCO model for all campus assets • Develop multi-year deferred maintenance strategy • Improve IT infrastructure/critical system resilience • Construct buildings and operate campus to meet carbon reduction goals • Participate in University District Partnership • Implement Campus Master Plan
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5. Develop a high-performing organization that will attract and retain best faculty, staff, and students.

Implement customer-facing processes and systems that drive efficiency	<ul style="list-style-type: none"> • Improve relationships—stakeholders, process partners, clients • Broaden Lean implementation • Implement TAP survey feedback in all services; enhance communication, access, visibility
HR specialists are strategic and consultative partners	<ul style="list-style-type: none"> • Enhance advisory role of HR specialists • Implement innovative solutions to workforce challenges: tech-sector competition, compensation, hiring process, promotion opportunity • Develop a sustainable funding model for Whole-U • Implement structure for career development and succession planning

6. Advance innovative, high-impact strategic initiatives across the University.

Accomplish FT project plan	<ul style="list-style-type: none"> • Design FT to meet/exceed campus needs, maximizing campus readiness and collaboration • Incorporate HR/P lessons learned into FT planning
Explore opportunities to advance innovation across UW administrative enterprise	<ul style="list-style-type: none"> • Leverage in-house expertise to enhance strategic planning, organizational design, and process improvement • Leverage Lean maturity
Support TAP objectives	<ul style="list-style-type: none"> • Expand role of ambassadors; enhance use of TAP Survey; conduct focus groups, deep-dive analysis, targeted improvement efforts; implement action-plan model • Develop a culture of service and communities of practice
Develop new approaches to developing revenues, reducing cost, and generating cash	<ul style="list-style-type: none"> • Explore new financial structures, leveraging assets, sharing control, and divesting assets

Resource Utilization

- Improved financial transparency, from operating forecasts to cash availability and debt capacity.
- Developed new debt and capital strategies resulting in confirmation of UW’s credit rating.
- Restructured CPD, realigning revenues and costs, and increasing the focus on planning.
- Reorganized Finance (3 AVPs) and recruited VP-Finance; restructured UW-HR; recruited UW-IT VP; initiated consolidation of CPD and Facilities Services under VP-Facilities.
- Managed the approval of FT to move forward to Readiness.
- Initiated efforts to develop a deferred maintenance strategy.

- Expanding Lean across UW-FA and campus units to reduce process waste.
- Managed the stabilization of the ISC (ongoing).
- Streamlining service catalogs: UW-IT, Transportation, Records.
- Revitalized Business Equity.

Emerging and Changing Personnel Needs

- Salaries/benefits increasing in the current regional economy, resulting in hiring and retention issues.
- Increasing compliance/risk-management burden.
- Balancing operating and improvement efforts.
- Increasing use of reserves to fund one-time projects.
- Commitment to redeploy 1% of operating costs from lower to higher priority initiatives.