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 | • Baseline/train employees on accountability, ethics, internal controls, compliance, privacy, & risk management
| • Develop/implement succession planning strategy |
| Engage all staff in continuous improvement | • Prioritize organizational/process improvement efforts—Lean, TAP
| • Increase engagement through Lean and Strategic Consulting
| • Implement robust performance management |
| Support the University’s diversity objectives | • 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 | • 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 | • 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 | • Support ISC stabilization  
• Complete FT initial planning phase  
• Improve cybersecurity/access management |
| --- | --- |
| Advance data-driven environment | • Develop University-wide data strategy  
• Champion data-based decision-making |
| Integrate efficient processes with new systems | • 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 | • 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 |
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 | • 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 | • 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 | • 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 | • Leverage in-house expertise to enhance strategic planning, organizational design, and process improvement  
| | • Leverage Lean maturity  
| Support TAP objectives | • 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 | • 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.