

UC, 10/11/17

Our Mission:

We provide community focused, campus-wide services that support and inspire excellence at UW-Madison.

Our Vision:

We enhance the experience of learning, discovering, working, and thriving at UW-Madison through integrated services and stewardship.

FY 2018-2020 OBJECTIVE

Define and implement foundational changes to the financial and administrative processes at UW-Madison to enable improved quality of service, efficiency, and modernization of campus' shared infrastructure in support of our academic mission.

GOALS

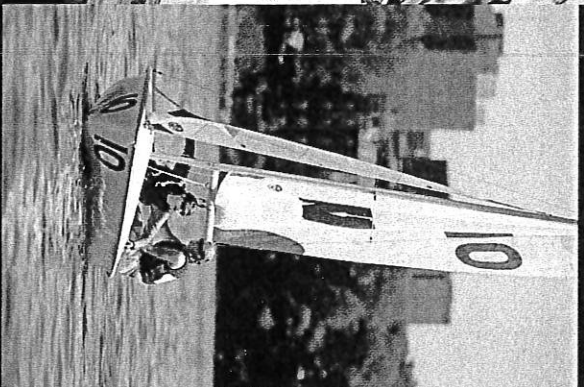
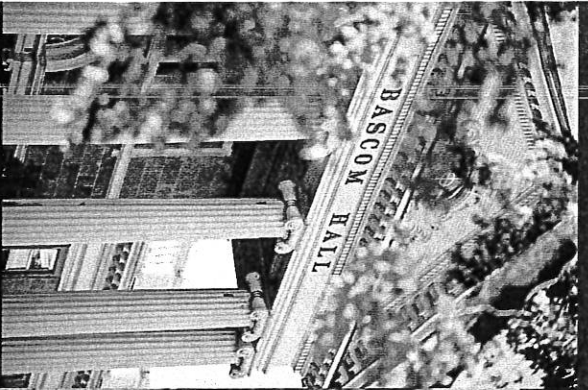
End 06/30/2020

	Baseline	Current	Goal
Campus Life			
Safety Metric	??	??	??
Wellness Metric	??	??	??
Best Place to Work			
Turnover Rate	12%	12%	8%
Diversity in Mgmt.	5%	5%	15%
Fac sal gap to market	\$25M	\$25M	-0-
Staff sal gap to mkt.	??	??	-0-
Financial Stewardship			
5-Yr Avg. Rev Growth	2.8%	3.2%	6%
Admin % of 101 Budg	12%	12%	10%
Acad. Reinvestment	--	--	\$20M
Service Excellence			
VCFA customer score	??	??	TBD
Infrastructure			
Campus facility score	??	??	??

STRATEGIES

<p>1. Improve Campus Life</p> <p>Engage with key campus partners (students, faculty, & staff) to deliver UW-Madison's expectations for a diverse, inclusive, safe and respectful campus to enable students and all members of the university community to achieve their full potential in learning, working and living.</p>	<ul style="list-style-type: none"> Develop and implement a strategy for reinforcing the physical safety of students, faculty, staff and visitors in both research and other facilities (Darling - 2018-20) Expand and strengthen campus-wide wellness initiative, building on UWell and efforts to ensure a safe and inclusive campus environment (Horn / UHS - 2018-20) Engage campus leadership and governance in a robust discussion about protests, free speech, and our shared values to guide campus responses (Roman – 2017-18) Expand the focus of the student employment initiative, WiGrow, to include enhanced employee recruitment and retention (Guthrie – 2018 – 2020)
<p>2. Be a Best Place to Work</p> <p>Develop culture that positions employees to excel in their current position and achieve career aspirations while delivering the core missions of the institution. Expand competitiveness in marketplace to build and retain a highly competent and diverse workforce.</p>	<ul style="list-style-type: none"> Complete and begin to implement the recommendations that emerge from our Title and Total Compensation study (Guthrie - 2018-2020) Investing in our workforce, enhancing professional development focusing on skill-building and preparing staff for future needs / advancement (Guthrie - 2018-2020) Provide clear expectations, training, programs, resources and feedback to employees about E.I.D. principles at UW-Madison (Heller 2018 – 2020).
<p>3. Enhance Financial Performance and Growth</p> <p>Position UW-Madison for the next decade through growth and optimization of financial resources. Partner with external entities to drive increased flexibility while minimizing barriers / friction points within our control.</p>	<ul style="list-style-type: none"> Develop 5-year financial strategy and associated projection model to deliver substantial revenue growth to fund campus reinvestment needs (Heller - 2018) Implement appropriate policies and procedures to advance the financial internal controls project, improving controls and safeguarding assets (Langer - 2018-2020) Develop & implement strategic sourcing project to save the campus substantial costs on purchased materials and services (Langer - 2018-2020)
<p>4. Ensure Service Excellence</p> <p>Provide highly effective services while minimizing their impact on campus resources. Remove barriers to productivity in the educational and research missions by implementing improvement processes and tools.</p>	<ul style="list-style-type: none"> Conduct new process to review, prioritize, and implement the current inventory of process improvement efforts currently under way across Finance & Administration (Frost – 2018-20) Improve campus reporting tools and data management to provide reliable information to campus staff and leadership at all levels (Fishbain/ Norris – 2018-20) Finalize and implement the VCFA IT Study team recommendations to improve service quality, reliability, and cost efficiency (Burrow – 2018-20)
<p>5. Campus Infrastructure and Investment</p> <p>Optimize UW-Madison's investments in physical and technology system assets to support our growth objectives while ensuring strong and effective financial controls as well as delivery of facility, infrastructure, and financial systems imperatives.</p>	<ul style="list-style-type: none"> Improve FPM capital delivery and renovations processes to improve timeliness and service quality while reducing deferred maintenance (Darling - 2018 – 2020) Assess capacity for possible changes in enrollment considering implications, opportunities, and constraints across campus (Novak / All – 2018-20) Explore options for development of campus real estate assets for revenue generation to support our academic and research missions (Darling – 2018-20) Implement UW System's modern campus budget system and develop a new, related budget process for annual divisional budget reviews (Norris - 2018-2020)

UC, 10/16/17



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

"Positioning for the next decade and beyond"

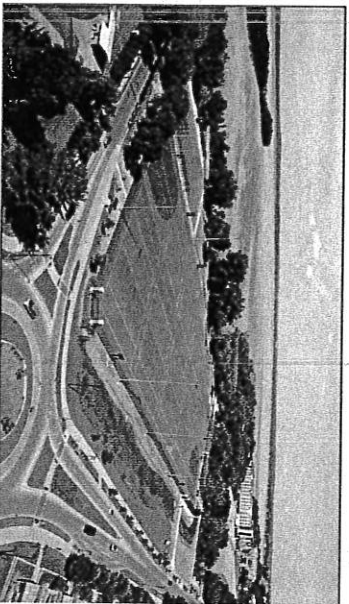
University Committee October 16, 2017

Laurent Heller, Vice Chancellor for Finance & Administration

Agenda

- Reflection and highlights from the last year
- Our strategic planning journey
- Retreat focus
- Next steps

Highlights from Finance & Administration over Near West Fields the last year



- Sampling of other key results**
- Launched Title & Total Comp
 - SNAP pilot at Gordon (Flamingo)
 - Developing P&L report for campus units and Asset Management Module
 - Updated campus master plan
 - Merged APR and OOI
 - UWPD triple certification

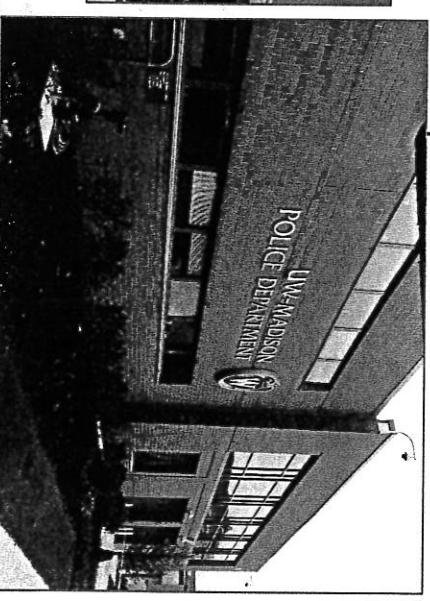
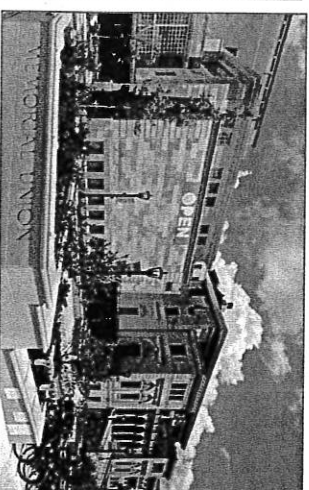


Best Health Services



Showing 1 - 20 of 20 results

#1
University of Wisconsin-Madison
Madison, WI • 31,710 Enrolled



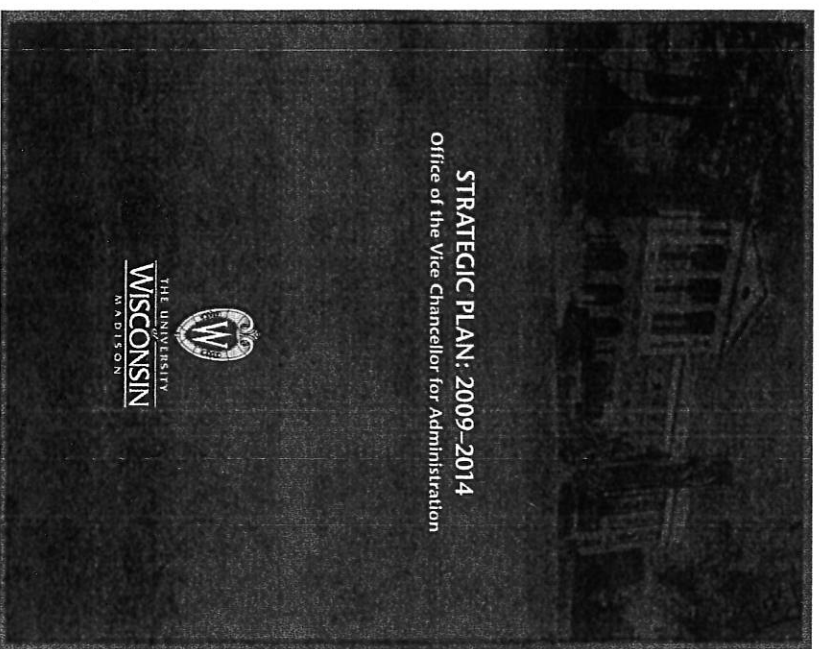
10/16/2017

Finance and Administration
UW-Madison

Why do a Strategic Plan now?

Achievements of the 2009-2014 Plan...

Build on existing focus on resources, student experience, employee engagement, and diversity



1. Resource Stewardship: Improve services and clearly demonstrate to campus customers and the public that resources are used responsibly
2. Diversity: Attract, develop, and retain under-represented employees
3. Undergraduate Education: VCA will work with partner units to:
 - Provide a range of experiences, activities and services that promote the development of students' personal and social responsibility.
 - Augment and support student-life opportunities outside the classroom to help build a sense of community and provide UW-Madison students with a comprehensive living and learning experience.
4. Recruit and Retain: VCA will provide leadership and work with campus partners to:
 - Attract and retain an outstanding and diverse faculty and staff.
 - Create an environment of respect and inclusiveness through opportunities for employee engagement.

Timeline of Activities...

January – Planning begins in VCFA Office, enlists OQI for help

February – AVC's & Directors surface themes for strategy development

March – First strategic planning retreat. Draft mission, vision, and major strategies developed

April / May – Refinement continues, discuss deliverables *

June – Second planning retreat develops draft "OGSP" for discussion

July / August – Refinement, plus EID Council does two planning sessions *

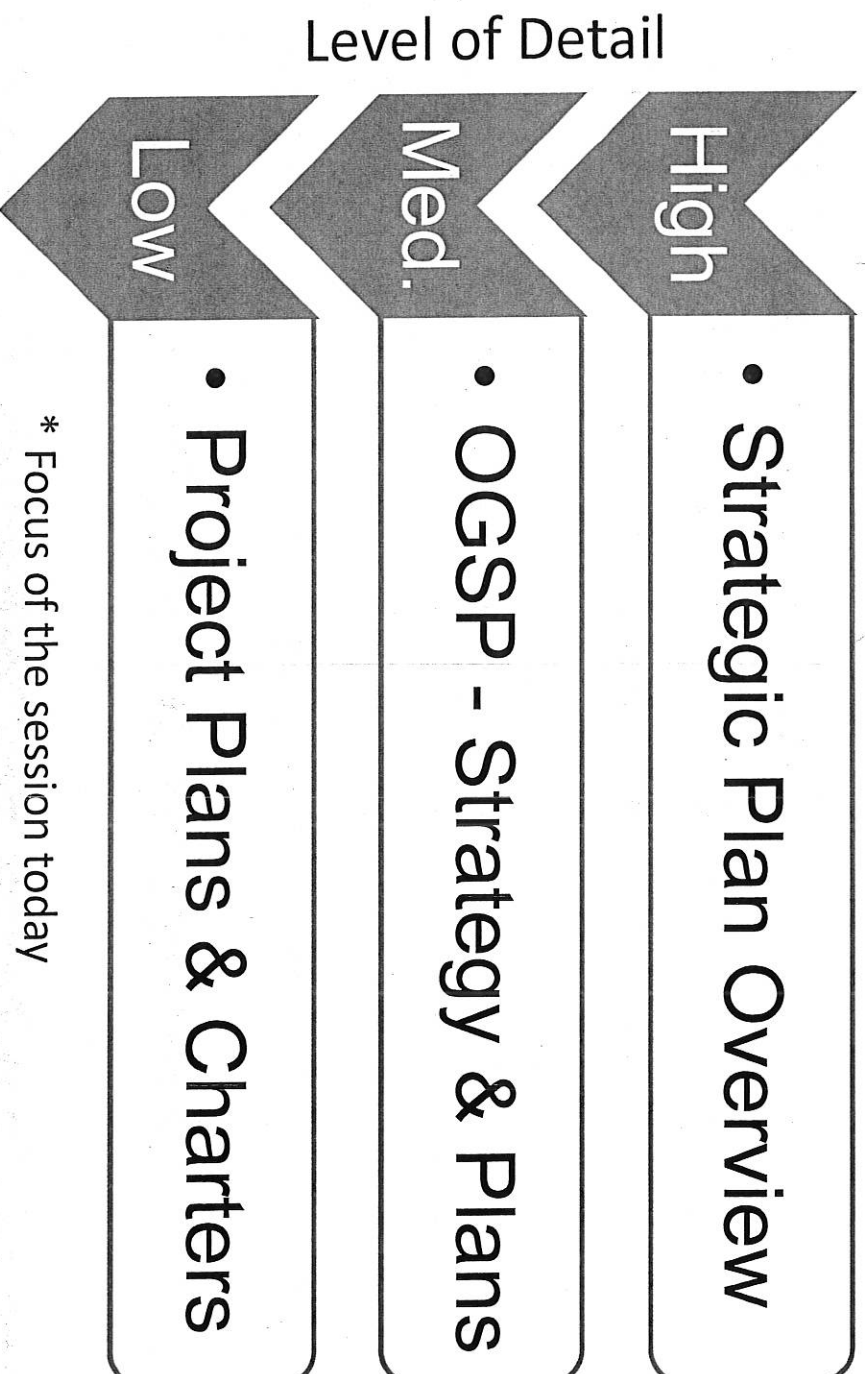
Sept. / October – Socialization of DRAFT plans with campus partners

TODAY – Finance & Administration Fall Retreat. Develop preliminary charters

*Individual Finance and Administration units review strategic priorities

Finance & Admin. Strategic Plan

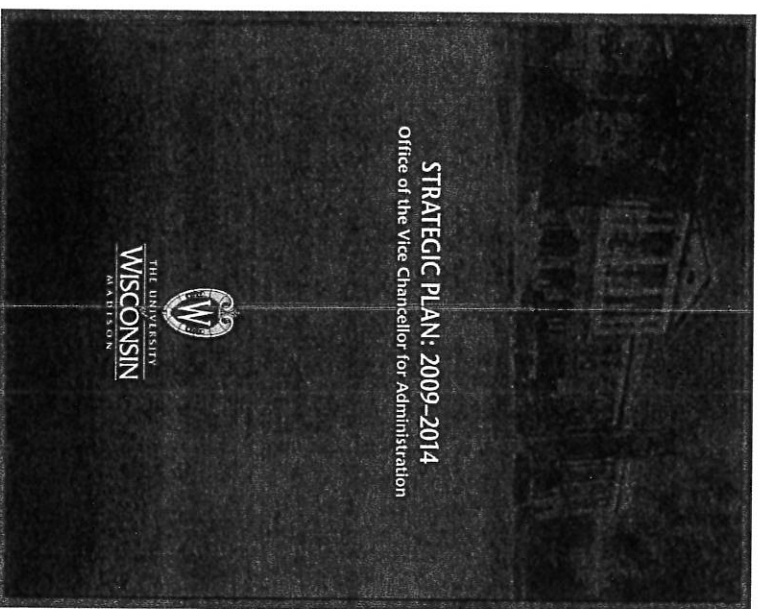
This plan aims to develop, communicate, and implement our shared strategy for Finance & Administration at multiple levels...



High-Level Strategic Plan

High Level

Aligned to UW-Madison strategic priorities and linkage to our strategies



STRATEGIC PLAN: 2009-2014 Office of the Vice Chancellor for Administration



STRATEGIC PLAN: 2009-2014

Introduction

I am pleased to introduce the strategic plan for the Office of the Vice Chancellor for Administration (VCA). This plan outlines our efforts to Administrate campus strategic priorities and support Chancellor Martin's commitment to the University of Wisconsin-Madison's mission. The VCA will enable the University of Wisconsin-Madison to strengthen its standing as a premier higher educational institution.

To build on our planning efforts, we will initiate projects to improve administrative cost savings, help build an open, diverse learning and working environment, and help build an open, diverse facility and staff. Exceptional work is being done all across our area, and we look forward to working with campus partners to strengthen our efforts.

UW-Madison has long had a national and international reputation for excellence in teaching, research, and service. We are proud to be a part of a campus community that continues to strengthen the link between the University of Wisconsin-Madison and the public, as our public, we will achieve our vision to be a model public university.

Darrell Bazzell

Our Mission

The Office of the Vice Chancellor for Administration and its affiliated units provide the highest quality administrative and student-life services to enhance the University of Wisconsin-Madison experience. The Vice Chancellor's office and its units strive for excellence in services relating to budget/finance, human resources, physical plant, public safety, student housing, social and cultural opportunities, health, recreation, and community building. These services come together to create the success and well-being of students, faculty, staff, alumni and the general public.

Aligning our Priorities with the Campus Strategic Framework

The University of Wisconsin-Madison has developed a campus Strategic Framework with a vision to be "a model public university in the 21st century, serving as a resource to the public and resulting to enhance the quality of life in the state, the nation, and the world." The Strategic Framework can be found online at www.wisc.edu/strategicframework. The VCA is working to align its efforts with the Strategic Framework through the many services we provide to the campus. Each VCA unit is developing initiatives that connect with and advance the six campus priorities. In addition, VCA-wide priorities and initiatives will focus on four of the six campus priorities:

- **Resource Stewardship:** The responsible stewardship of our resources.
- **Diversity Attract, Develop, and Retain:** Attract, develop, and retain a diverse faculty and research.
- **Undergraduate Education:** Provide an exemplary undergraduate education.
- **Research and Retain:** Research and retain the best faculty and staff, and reward merit.

Our Strategic Priorities: 2009-2014

Resource Stewardship: Improve services and clearly demonstrate to campus customers and the public that resources are used responsibly by:

- Improving and enhancing services and responsiveness to campus customers as well as identify cost savings and improve the institution's financial performance.
- Sharing services across VCA units and with VCA partners to increase collaboration, reduce redundancy and duplication, and free up resources for reallocation.

Diversity Attract, Develop, and Retain: Attract, develop, and retain underrepresented employees by:

- Building an open, dynamic and respectful learning and working environment.
- Increasing the number of underrepresented employees with a particular focus on supervisory and managerial positions.

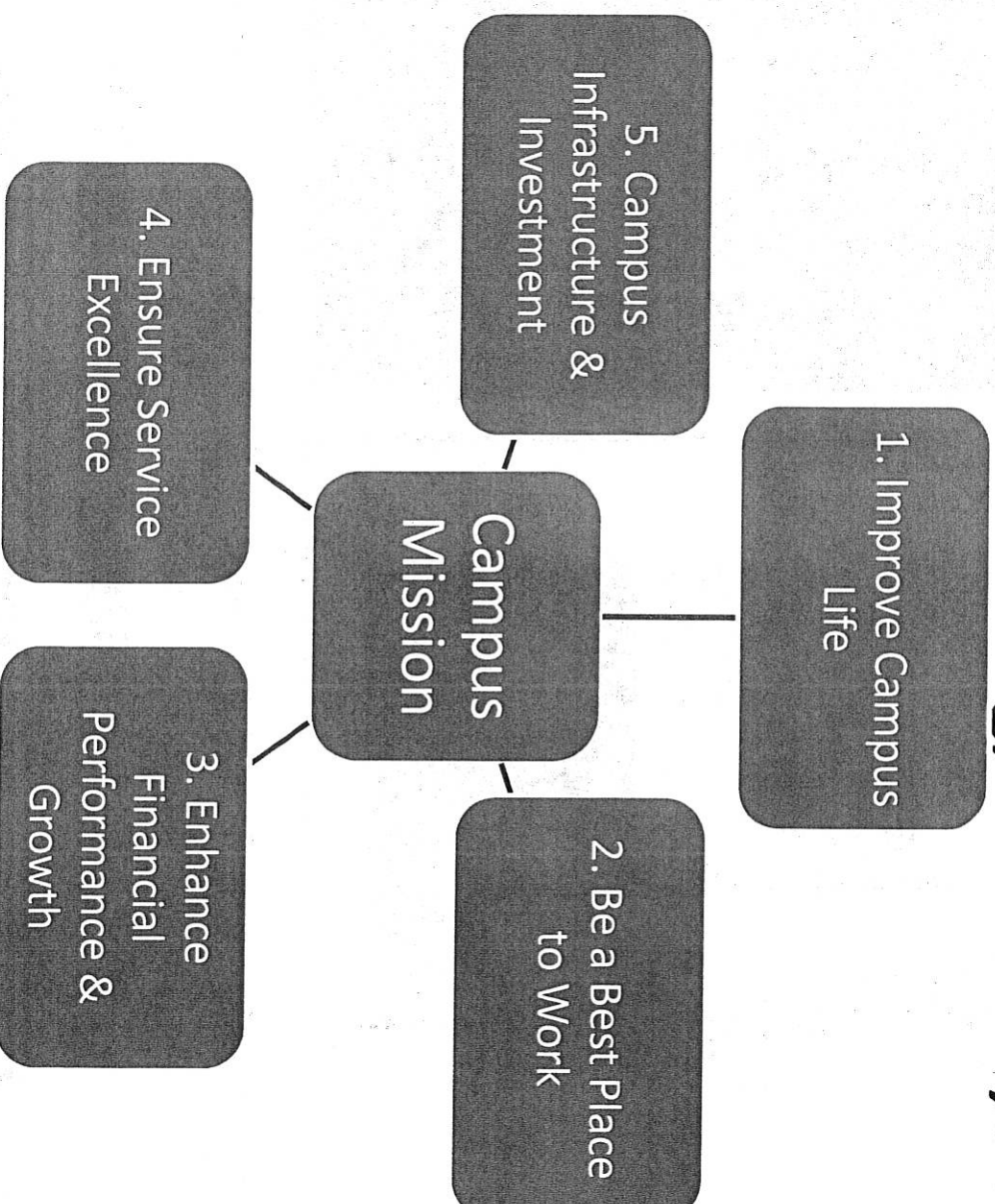
Undergraduate Education: VCA will work with partner units to:

- Enhance the quality of the undergraduate experience and services that promote the development of students, research and social responsibility.
- Attract and support student-life opportunities outside the classroom to help build a sense of community and provide UW-Madison students with a comprehensive living and learning experience.

Research and Retain: VCA will provide leadership and work with campus partners to:

- Attract and retain an outstanding and diverse faculty and staff.
- Create an environment of respect and inclusiveness through opportunities for employee engagement.

Finance & Administration strategic pillars align to campus mission of teaching, research, & service



OGSP

Medium Level

“Objective, Goals, Strategies and Plans”

OGSP is a one-page template with five sections:

Mission

Objective

Goals

Strategies

Plans

Mission

- Concise statement of “Why we are here” or “What we do”.

Objective

- What success looks like for the organization over a 5 year period. Expressed in a sentence.

Goals

- Metrics which will track progress vs. the Objective. Expressed in 3-4 key numbers (tracked regularly).

Strategies

- The “How” - choices that define where we will focus our effort.

Plans

- The most important (3-5) projects that define each strategy.

Project Plans / Charters

Low Level

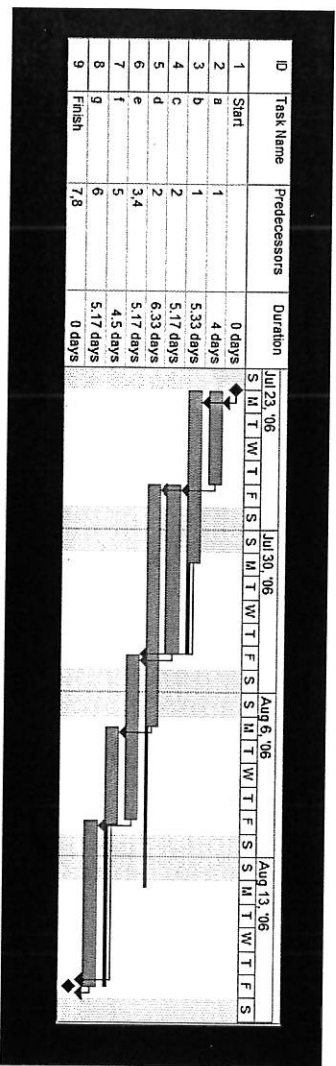
Preliminary work today on rough charter with more detail over the balance of the semester



Lab Space Assignments and Renovations Project Charter

DRAFT 05.17.17

Project Name	Lab Space Assignments and Renovations Process Improvement (part of the FPM Service Excellence Project)
Executive Sponsor(s)	Laurent Heller, Vice Chancellor for Finance and Administration Marsha Mallick, Vice Chancellor for Research and Graduate Education
Process Owner(s)	Margaret Temmessen, Interim Assoc. Vice Chancellor, FP&M Pam Barrett, Director, FP&M Campus Renovation Services Brent Lloyd, Director, FP&M Space Management
Background	<p>The growth of revenue, including research expenditures, is a strategic priority of the university in the next few years. As such, senior leaders are asking campus units to make proactive changes to support this effort. The Intersection for FP&M in this effort is in working in partnership with academic departments to create an appropriate space capacity for research and the timely preparation of specialized spaces for new research endeavors. There is urgency related to the need for fully utilized, well-designed laboratory space so this project is on an accelerated path.</p> <p>It does not appear that a visible end-to-end process exists for the assignment, decommissioning and reassignment of research lab space at the institutional level of the university.</p> <p><u>Baseline Data</u></p> <p>Lab space is divided into two categories – Research/Nonclass Laboratory (46%) and Research/Nonclass Laboratory Service (54%). The service category captures space used to support laboratory research such as diagnostic space, storage, toilets, garages, etc.</p> <p>Currently, about 41% of total research space is dedicated to wet or dry laboratories by square footage; 89% by number of rooms.</p> <p>In the time span of 2014-2016, 317 lab renovation projects were initiated within the CIS portfolio. Of the 66 projects completed and measured, it took an average of 350 days from intake to construction completion and 535 days from intake to final billing. It should be noted that data were gathered manually through a sampling method.</p>



Next steps

CURRENT PROJECTS

Showing 1 to 4 of 5 entries

PROJECT ▾	OVERVIEW ▾	BUSINESS OWNER ▾	STATUS ▾
Capital Equipment Implementation (Financial Internal Controls)	Implement improvements to inventory tracking of capital equipment across campus.	Division of Business Services	Phase 1 - Completed, Phase 2 - Current
Financial Information Management and Financial Reporting (Financial Internal Controls)	Establish accounting practices and activities to ensure integrity of data across all campus financial processes.	Division of Business Services	Report completed. Project team continuing.
Financial (Profit and Loss) Report Development	Design and produce rough drafts of monthly Profit and Loss (P&L) statements for each division and the overall institution.	Accounting Services, Division of Business Services; Administrative Council	Current
Purchasing Card Compliance Implementation (Financial Internal Controls)	Refine and develop better controls and related monitoring around purchasing cards used by UW-Madison employees.	Controller and Director of Accounting Services, Division of Business Services	Current
Student/Parent Financial Portal	Provide students and parents with one location for viewing university bills and account balances and for making payments.	TBD	On hold
Project ▾	Overview ▾	Business Owner ▾	Status ▾

« < 1 > »

- Solicit further feedback
 - Deans Council
 - Administrative Council
 - Governance
 - ...
- Establish steering team / program management office
- Finalize the project charters
- Establish work teams
- Post charters to shared website and track progress