

# Vision

We will enable our university community to excel by being great stewards and providing a great place to work, live, and discover.

## we make blue go

collaboration & partnership | community service | diversity, equity, & inclusion

ethics & integrity | health, safety, & environment | innovation

professional growth & development | quality & customer service | respect | stewardship

We will approach the following initiatives with tenacity and passion:



### Say yes

We will serve our community by striving to say yes



### Workplace

We will be a great place to work



### Leadership

We will promote a culture of leadership



### Stewardship

We will be great stewards of knowledge, resources, and information

1. Research administration training
2. Revamp customer satisfaction survey program
3. Learning analytics
4. Data virtualization (Information as a service)

1. B&F Diversity, Equity & Inclusion plan - year one
2. Bi-Centennial staff observation
3. Lean Implementation - year one
4. Actions based on 2016 employee satisfaction survey results
5. Culture of health (high risk populations)
6. Employee empowerment and engagement

1. B & F communications
2. Support sustainability
3. Leadership development
4. Leverage shared services

1. Data concierge services
2. Supplier self-service portal
3. Health system master planning
4. Metro health integration
5. FLSA implementation
6. Benefits, cost and quality (mail order)
7. Research safety
8. Support U-M entrepreneurial efforts

## COURAGEOUS VISION | BOLD GOALS



## Say yes

We will serve our community by striving to say yes

### 1 Research administration training

Tactic 1.1: Create a course on Uniform Guidance to be delivered to research administrators.

Tactic 1.2: Create a three level course on Advanced Budgeting to educate research administrators on budgeting for sponsored projects.

Tactic 1.3: Deliver the new seven-day Navigate-Fundamentals course covering the life cycle of a sponsored project to research administrators, achieving a satisfaction metric of greater than 75%.

### 2 Implementing the revamp of the customer service survey program

Tactic 2.1: Create FY17 implementation timetable and gain Senior Staff approval in October 2016.

Tactic 2.2: Begin launch of revamped process by March 31, 2017 with at least 25 B&F units.

Tactic 2.3: Create and present sample summary report.

### 3 Learning Analytics

Tactic 3.1: Release initial LARC (Learning Analytics Data Architecture) data set to members of the Learning Analytics community in September 2016.

Tactic 3.2: Release enhanced LARC data set in January 2017 to the same community.

Tactic 3.3: Evaluate opportunity to partner with Health Information Technology and Services on Learning Analytics Data Warehouse initiatives. Produce a summary of the collaboration opportunities.

### 4 Data Virtualization (Information as a service)

Tactic 4.1: Evaluate vendors and make recommendation for a product selection.

Tactic 4.2: Implement pilot projects and summarize results and related recommendations. Present a plan to Learning Analytics stakeholders.



## Workplace

We will be a great place to work

### 1 B&F diversity, equity & inclusion plan-year one

Tactic 1.1: Implement year one B&F DE&I plan.

Tactic 1.2: Senior Staff will conduct mid-year progress review by January 31, 2017.

### 2 Bi-Centennial staff observation

Tactic 2.1: Create a meaningful and impactful Bicentennial Event to honor university staff on June 27, 2017. Event will be measured by participation rate and survey results.

### 3 Lean implementation - year one

Tactic 3.1: Facilitate the development of Model Cell at the Shared Services Center by leading three 16-week "interval" training sessions to introduce Lean methods.

## Strategic Plan, Initiatives, Goals, and Tactics at a Glance

Tactic 3.2: Build Lean coaching capacity through mentoring individuals, teams, and partnering with UMHS for core Lean training. Report on increased capacity.

Tactic 3.3: Develop and implement one Lean facilitator course and one Lean management course.

Tactic 3.4: Expand depth and breadth of Lean communication to raise awareness, including Lean Community of Practice, B&F Lean web page, and leadership communication. Create summary report showing expansion.

### 4 Actions based on 2016 B&F Employee Satisfaction Survey Results

Tactic 4.1: By December 1, 2016, each area will conduct a deeper-dive analysis of their 2016 BFESS results (including comments) and publish a summary of the root causes, areas for focused improvement and related action plans.

Tactic 4.2: By June 30, 2017, Senior Staff will conduct a mid-cycle review of progress on action plans based on 2016 employee survey results satisfaction.

### 5 Culture of Health

Tactic 5.1: Develop and implement a chronic conditions strategy to engage populations at highest risk with the University: Launch implementation of interventions recommended by back care task force to address back pain, Launch Phase II of Diabetes Prevention Program by December 2016, Develop recommendations to address depression related disorders by March 2017.

Tactic 5.2: Develop and pilot at least one training to build manager and supervisor capability to effectively create healthy workplace cultures at the unit level.

### 6 Employee empowerment and engagement

Tactic 6.1: Conduct one Liberating Structures Immersion workshop for B&F managers and supervisors. Evaluate workshop and Liberating Structures practices with regard to further adoption within B&F and provide report to Senior Staff.



## Leadership

We will promote a culture of leadership

### 1 B&F Communications

Tactic 1.1: Publish revised B&F web page in October, 2016. Migrate quarterly B&F newsletter into an ongoing "news and updates" section on the web page.

Tactic 1.2: Executive Vice President, Chief Financial Officer, Kevin Hegarty, will begin sending short, recurring email updates to all B&F staff beginning October 2016.

### 2 Support Sustainability

Tactic 2.1: Implement waste/recycling bin labeling and signage standardization per the Waste/Recycling Bin Standardization Committee in 65 campus buildings and 20 outdoor locations by June 30, 2017.

Tactic 2.2: Develop a plan to add a gas turbine to the campus central power plant co-generation facility to lower overall campus emissions of greenhouse gasses by 20%. Engage project specifics with key faculty on an ongoing basis toward an implementation strategy.

### 3 Leadership development

Tactic 3.1: Develop, design and deliver an implementation proposal for a leadership development program that will enhance leadership at all levels and support succession planning.

### 4 Leveraging shared services

Tactic 4.1: Explore opportunities for new customers to utilize existing services and document a summary of the exploration.

Tactic 4.2: Continue service exploration through customer feedback and pilots and prepare summary of recommendations.

Tactic 4.3: Support development of Lean Model Cell by training 80% of functional teams in Lean and Daily Work: engaging partners to view progress via tours/report outs, and develop one value stream map (end-to-end process) with partners (i.e., F&O).



# Stewardship

We will be great stewards of knowledge, resources, and information

## Strategic Plan, Initiatives, Goals, and Tactics at a Glance

### 1 IQ Data concierge services

Tactic 1.1: Establish streamlined processes, roles, and responsibilities for handling different types of enterprise data requests in order to improve customer experience.

Tactic 1.2: Improve quality and consistency of data requests by working directly with the customer, analyzing business needs/benefits, and facilitating governance reviews.

Tactic 1.3: Capture and analyze service indicators to facilitate decisions regarding the future of the service.

### 2 Supplier self-service portal

Tactic 2.1: Present written implementation plan and recommendation report for supplier self-service portal based on assessing needs and possible solutions.

### 3 Health system master planning

Tactic 3.1: Prepare UMHS Strategic Facility Planning report with site selection.

### 4 MetroHealth integration

Tactic 4.1: Assess and report potential affiliation by reviewing MetroHealth's current state and assessing impact on U-M in the areas of human resources and finance.

Tactic 4.2: Conduct due diligence with a focus on benefits, labor relations, debt refinancing, financial reporting/close process, risk management and tax. Provide reports.

Tactic 4.3: Support implementation/integration activities of MetroHealth with U-M health system and report monthly to the EVPCFO.

### 5 FLSA implementation

Tactic 5.1: Implement policy, practice, system, process, reporting changes in HR system in accordance with standards while minimizing incremental costs managing to budget, ensuring compliance and conducting positive change management for all affected faculty and staff. Provide summary report.

Tactic 5.2: Implement new provisions of FLSA (Fair Labor Standards Act) in Payroll system by developing, testing, and implementing additional earnings codes to assist with the conversion by December 1, 2016.

### 6 Benefits, cost and quality (mail order)

Tactic 6.1: Continue partnership with UMHS to develop a value-based payment approach for care delivered to Premier Care members by UMHS physicians.

Tactic 6.2: Develop options for cost savings and improved clinical management of specialty drugs between the pharmacy plan and medical plan by June 2017.

Tactic 6.3: Develop strategies to improve Mail Order Utilization with U-M members from current 8.5% utilization to 10% by June 2017.

### 7 Research safety

Tactic 7.1: Procure environmental health and safety system software and populate with existing OSEH laboratory data by March 31, 2017

### 8 Support U-M entrepreneurial efforts

Tactic 8.1: Serve as investment manager for the MINTS program which invests directly into companies that are based on U-M developed technologies.

Tactic 8.2: Provide operational and administrative guidance and support to investment oriented initiatives sponsored by schools across campus.