# MSU Billings

## Administrative Services

# Strategic Plan

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*Prepared by:*

Terrie Iverson
LeAnn Anderson
Michael Barber
Eakle Barfield
Scott Forshee
Jim Nielsen
Ken Siebert
Janet Simon
Susan Stewart
Liz Tooley
Ray Svenson

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# Strategic Plan

## I.  Introduction

This strategic plan, developed by the MSUB Administrative Services Division in February of 2011, provides a flexible roadmap for the future of the division.  As plans are completed for the University, the Billings campus, and the other divisions, the Administrative Services strategic plan must be adjusted for total alignment.

This strategic plan was developed by the Administrative Services leadership team in three phases:

1.  Current State Assessment – Creates a baseline from which to move forward

2.  Future State Design – Creates a long range set of targets to aim for

3.  Implementation Plan – Creates annual objectives and actions to move toward the long range targets

Administrative Services will review progress toward annual objectives at its regular leadership meetings.

# II.  Current State Assessment

The Current State Assessment creates a baseline from which to move forward.  It is divided into the following sections:

- Context
- Culture
- Services
- Biggest Current Challenges

Each of these sections contains implications for future plans.

## *Context*

This section contains elements of the larger context within which Administrative Services operates and implications of these context elements for future planning.

| CONTEXT | IMPLICATIONS |
|---|---|
| Limited State support | <ul><li>5-10% cuts/year</li><li>Pay freezes</li><li>Pressure to reallocate resources to instruction</li></ul> |
| Economic recovery | <ul><li>Puts pressure on enrollment and fees</li><li>Recalibrate expectations about what is normal</li></ul> |
| Saturated with change | <ul><li>Planning uncertainty</li></ul> |
| Forecasted change in leadership (retirements) | <ul><li>Succession planning</li></ul> |
| Student recruiting and retention<br><br>• At 5,000<br><br>• Going to 5,000-6,000 | <ul><li>More classrooms and faculty</li><li>More capacity</li><li>Security issues</li></ul> |
| Change in emphasis from four-year to two-year education (possible COT separation) | <ul><li>Funding implications</li><li>Staff</li><li>Administrative staff allocation</li></ul> |
| Top-down University initiatives<br>• One university<br>• Core themes | <ul><li>MSUB identity</li><li>Managing assumptions</li></ul> |
| Change in academic and University leadership | <ul><li>Increased training</li><li>Need documented internal procedures and policies</li></ul> |

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## Context *(cont.)*

| CONTEXT | IMPLICATIONS |
|---|---|
| Distance/e-Learning<br>• Competitive pressure<br>• We're ahead of the curve | • Facility implications<br>• Regulatory issues |
| Compliance and regulatory issues<br>• Northwest accreditation<br>• Federal<br>  - Financial aid<br>  - Information security<br>• Legislative Auditors | • Compliance reporting capacity<br>• Educating others |

## Culture

There are a number of cultural dimensions that have implications for future planning.

| CULTURE | IMPLICATIONS |
|---|---|
| • Communication<br><br>• Priority<br><br>• Heavily regulated externally<br><br>• Changes in leadership | • Potential for misunderstanding/miscommunication<br>• Difficulty with teamwork<br>• Training needed<br>• Policies and procedures need to be communicated<br>• Interdepartmental public relations |

## *Services*

In this section, the Administrative Services leadership team identified its portfolio of services, assessed the current state of performance of each service, and identified opportunities for future planning.

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| Business Services<br>• Purchasing | • Essential<br>• Too much paperwork<br>• Not timely<br>• Limited peak load capacity | • Purchasing automation<br>• Cycle time reduction<br>• Client education |
| • Accounts Payable | • Automated within Accounts Payable | • Automate the front end process |
| • Student accounts | • Automated (except payment for parking) | • ACH for student refunds<br>• Automate installment process |
| Information Technology<br>• Core infrastructure (servers, e-mail) | • Effective and efficient<br>• BPR integration speed issues | • Expanded wireless<br>• Outsource to Google |
| • Support services (desktop support, maintenance, classroom support) | • Desktop support is good<br>• Help Desk:  resources and process | • Help Desk process and resource review |
| • Programming<br>- Interfaces to 3<sup>rd</sup> party systems | • Resource constraints limit the amount and speed<br>• Bozeman constraints | • Process review of priorities for programming tasks with flat resources<br>• Adding resources<br>• Offload to trained staffs |
| • Institutional research | • Working well | • Deal with expanded requests for new academic requirements |
| • e-Learning technology | • It's working<br>• Has been cost reduced | • Shift to open source |

## Services *(cont.)*

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| KEMC<br>• Broadcasting infra-structure management and maintenance | • Works well internally<br>• In compliance<br>• Well documented reporting | • Backup resources and information sharing within the University |
| • Broadcast regulatory compliance<br>  - Content<br>  - Facilities | • Works well internally<br>• In compliance<br>• Well documented | • Backup resources and information sharing within the University |
| • Internal IT | • Aging; needs upgrading<br>• Upgrade broadcast infrastructure | • Integrate with internal IT (analog → digital) |
| • Fundraising | • Successful<br>• Changing source mix and message | • IT support for fundraising<br>• Funding source education |
| • Financial manage-ment/budgeting | • Most improved area | • Create better understanding with University |
| • University outreach | • Can be improved<br>• Needs better definition from University | • Closer identification of YPR with MSUB<br>• Communicate MSUB to public<br>• Develop clear expectations |
| • Civic engagement | • Well developed<br>• Limited by staff resources<br>• Journalistic integrity | • Further development<br>• Create more regional content and listener engagement |
| Police and Safety<br>• Quality of life (vehicle and other support services) | • Just meet expectations with no excess capacity (24/7 service) | • Evaluate outsourcing and/or volunteers |
| • Safety<br>  - Theft<br>  - Accidents<br>  - Slips and falls<br>  - Crisis management | • Effective<br>• Use Billings police partnership | • More awareness and training on crisis management for entire campus |
| • Parking | • Not meeting online permitting desires of parents/students<br>• Enforcement good | • Develop online permitting<br>• Reassess the lots |

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| • Building inspections <br> - Fire <br> - Security | • Good service <br> • Improved | • Continue to learn and improve |

## *Services (cont.)*

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| Financial Services<br>• Accounting, fiscal management and reporting | • Accounting is in good condition; meeting standards<br><br>• External reporting is working<br><br>• Internal reporting is limited | • Provide training to campus departments<br><br>• Improve efficiency by automating<br>• Allow users access to their data to generate reports (keep data they need; eliminate shadow data) |
| • Grants and contract fiscal management | • Accounting is in good condition; meeting standards<br>• External reporting is working<br>• Internal reporting is limited | • Provide training to campus departments<br><br>• Allow users access to their data to generate reports (keep data they need; eliminate shadow data) |
| • Payroll | • Works well<br>• Internal reporting is limited<br>  - Especially custom reports | • Improve hiring paperwork - EPAF or workflow<br>• Payroll cycle reevaluation - MSUii<br>• Process documentation<br>• Provide training on MSUB process and procedures |
| • Fixed Assets/ Property Management | • Works well | • Enhance reporting |
| • Cash and Investment Management | • Works well | • Automate process |

## Services *(cont.)*

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| Vice Chancellor<br>• Contracts | • Employees signing contracts who don't have the authority | • Training on delegation of authority and approval process |
| • Insurance (all non-medical) | • Good coverage<br>• We may have issues of compliance with insurance rules | • Proactive training |
| • Legal | • Its working; we call on Bozeman for legal support | |
| COT (College of Technology)<br>• Business services | • We do well when business office is staffed<br><br>• Shadow tracking system | • Create a backup system<br><br>• Allow users access to their data to generate reports (keep data they need; eliminate shadow data) |
| • Parking permits | • We do well when business office is staffed<br><br>• Shadow tracking system (handled by the same person as business services) | • Create a backup system<br><br>• Allow users access to their data to generate reports (keep data they need; eliminate shadow data) |
| • Facilities services<br>  - Grounds<br>  - Roads<br>  - Buildings | • Services done well but may be late, e.g., snow removal (resource availability) | • Resource allocation<br>• Custodial job redesign |

## Services *(cont.)*

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| Human Resources<br>• Recruiting | • Recruitment Authorization Forms are being delayed in reaching the HR office.  HR Office process works well. | • Expectation awareness<br>• Process management and/or improvement |
| • Employee relations (including performance management) | • Priority matrix is in constant flux<br>• Issues/investigations consume resources and slow the flow<br>• MUS system issues limit the time available to handle MSUB HR issues | • Training<br>• Status update of information to departments and employees<br>• HR handling issues in order of priority of issues |
| • Compliance<br>  - Federal<br>  - State<br>  - Board of Regents<br>  - Campus Policies | • Some policies not written<br>• Limited reports | • Compliance training<br>• Generate more needed reports |
| • Employee benefits<br>  - Administration<br>    – Orientation<br>    – Paperwork<br>    – Employee and retiree support | • Working well<br>• Online | |
| • Compensation<br>  - Administration and development | • Working well<br>• Not competitive | • Manager training |
| • Professional development/ succession/ talent management | • Doesn't exist | • Develop a MSUB plan |

## Services *(cont.)*

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| Budget Office<br>• Budget development | • With new leadership, MSUB internal processes are being redefined and are not always consistent between divisions | • Establish mutually agreed upon and consistent procedures and require all university departments to follow them<br>• Provide budget development training and support to all divisions New University Budget Committee |
| • Budget management, projections and analysis | • Budget Office provides individual budget monitoring, reconciliation, projections and analysis at the University level and to some university departments which can limit time available to accomplish other budget tasks<br>• Budget Office tracks part time faculty/faculty extra compensation budget for Provost's Office | • Instead of doing the monitoring and reconciliation for departments, provide training and/or create budget monitoring expense reports for managers to use<br>• Budget Director and Budget Analyst should go to training to be able to write special reports, to automate some reports, and create efficiencies |
| • Budget training and coaching<br>　- Web page<br>　- Presentations on request | • Effective when requested | • Offer more proactive and consistent training; |
| • Internal audit<br>　- Payroll<br>　- Bank reconciliation<br>　- Problems | • Payroll audit had to be redesigned because old process didn't work after Banner upgrade | • Evaluate whether new process is as effective as the previous process |

## Services *(cont.)*

| SERVICES | CURRENT ASSESSMENT | OPPORTUNITIES |
|---|---|---|
| Facility services<br>• Maintenance<br>  - Repairs<br>  - Custodial<br>  - Grounds | • Doing well<br>• Preventive maintenance program in place | • More uniform maintenance standards and practices across University including auxiliaries |
| • Construction | • Projects completed on time<br>• Scope creep on final details drives up cost | • Deeply involve technology in all phases<br>• Create better awareness by customer in design phase |
| • Long range planning | • Planning for a moving target<br>• Developing an auxiliaries plan | • University strategic plan will better define the target |
| • Energy conservation and sustainability | • Started sustainability projects<br>• Energy conservation strategy implemented and successful | • Continue implementing conservation strategy<br>• Create sustainability awareness (KEMC)<br>• Sustainability plan for campus |
| • Compliance<br>  - Hazardous waste<br>  - ADA<br>  - Codes | • Meeting minimum requirements | • Create greater awareness of impact of new programs |

## *Biggest Current Challenges*

This section documents a summary of the biggest current challenges faced by Administrative Services as a whole and identifies related opportunities looking forward.

| BIGGEST CURRENT CHALLENGES | OPPORTUNITIES |
|---|---|
| 1.   Change initiatives from Bozeman, MSUB, legislature, Board of Regents, and Federal government | • Stay tuned in<br>• Adjust Administrative Services plans as appropriate |
| 2.  Loss of institutional knowledge due to retirements in Administrative Services and in other MSUB Divisions | • Process documentation<br>• Succession planning<br>• Formalize policies<br>• Training |
| 3.  Doing the same or more with less | • Rationalize service portfolio<br>• Automation opportunities<br>• MSUii initiative<br>• Define and manage cross-division processes |
| 4.  Succession planning within Administrative Services | • Succession planning<br>• Target organization structure |
| 5.  Wage level impact on recruiting, retention, and morale | • Professional development<br>• Desirable work environment |
| 6.  Awareness of Administrative Services value<br>• Divisions<br>• Students | • Account management<br>• Orientation of new leaders<br>• In-service training |
| 7.  Redefining communication workflow, processes and policies with other Divisions | • Cross-division process definition including roles and responsibilities<br>• Establish internal written policies and procedures<br>• Provide training<br>• Account management (AS Directors work with constituents across campus) |

# III.  Future State Design

The Future State Design starts with statements of Administrative Services mission, vision, and values.  It then identifies seven long-term goals for Administrative Services with strategies for accomplishing each goal and metrics to track progress.  Next, are current strengths, weaknesses, and opportunities identified in the context of the goals and strategies.  Finally, some organizational structure and roles changes are identified to enhance the Division's effectiveness.

## Mission

Administrative Services is a professional, customer-oriented team providing service excellence to the University community.  We are responsible stewards of the resources invested in higher education.

## Vision

We are a proactive, efficient, and effective team dedicated to providing services responsive to our customers' needs.

## Values

- Customer-centered service excellence
- Accountability
- Respect
- Stewardship
- Responsiveness
- Collaboration
- Efficiency and effectiveness
- Integrity

## *Goals, Strategies, and Metrics*

There are seven goals, each of which identifies a desired future state.  Each goal is accompanied by a set of strategies for moving toward the goal and metrics to track progress.

| Goal 1:  Develop a comprehensive training strategy and program for the University to build awareness, knowledge, and skills on Administrative Services and processes | |
| --- | --- |
| **STRATEGIES** | **METRICS** |
| 1.  Comprehensive policies, process, and procedure documentation (see Goal 2)<br><br>2.  Create an interdepartmental training team to:<br>  • Identify and prioritize training needs<br>  • Identify training methods to use<br>  • Plan the development of training materials<br>  • Plan training delivery<br>  • Monitor results<br><br>3.  Use professional instructional design help | • Customer feedback (before and after)<br><br>• Error tracking<br><br>• Improved process performance, e.g., timeliness |

| Goal 2:  Define and document cross-divisional processes, policies, and procedures | |
| --- | --- |
| **STRATEGIES** | **METRICS** |
| 1.  Evaluate Bozeman processes, policies, and procedures for possible adaptation to Billings campus<br><br>2.  Identify a standard format<br><br>3.  Identify and prioritize processes<br><br>4.  Establish divisional teams to:<br>  • Evaluate current process and documentation<br>  • Define desired processes, policies, and procedures<br>  • Identify automation opportunities<br>  • Seek approval | • Processes, policies, and procedures defined and approved<br><br>• Process performance improvement<br>  - Timeliness<br>  - Accuracy<br>  - Cost<br><br>• Customer satisfaction<br>  - Divisions<br>  - Administrative Services<br>  - End users |

## *Goals, Strategies, and Metrics (cont.)*

| Goal 3:  Proactively engage and align with strategic planning and strategic initiatives at the MSUB, MSU, and Regents levels | |
|---|---|
| **STRATEGIES** | **METRICS** |
| 1.  Participate in:<br>• System and Regents levels<br>• MSUii teams<br>• MSUB cross-division teams<br>• Master plans<br><br>2.  Develop a proactive liaison with strategic planning efforts in MSUB<br><br>3.  Proactively support other divisions' strategic planning<br><br>4.  Seek comments and support for our strategic plan from the divisions and Chancellor | • Goal and objective alignment top-to-bottom and side-to-side<br><br>• No surprises |

| Goal 4:  Create a safe, fun, and inviting working, living, and learning environment | |
|---|---|
| **STRATEGIES** | **METRICS** |
| 1.  Provide a classroom technology environment that is fun and inviting<br><br>2.  Identify actual and potentially unsafe conditions and eliminate or mitigate<br><br>3.  Provide a safe, ergonomic, and inviting work environment for employees<br><br>4.  Foster and maintain a positive work culture<br><br>5.  Account management interface<br><br>6.  Emergency Crisis Communication Committee | • Trend data<br>  - Customer feedback<br>  - Student attitude surveys<br>  - Faculty and staff surveys<br>  - Accident statistics<br>  - OSHA violations<br>  - Building inspections |

## *Goals, Strategies, and Metrics* (cont.)

| Goal 5:   Create a standard dashboard reporting system for Administrative Services | |
|---|---|
| **STRATEGIES** | **METRICS** |
| 1.  Cross-department team <br> • Identify desired reports <br> • Evaluate existing reports <br> • Design new report portfolio and data sources <br><br> 2.  Report designer create the reports | • Accuracy <br><br> • Consistency <br><br> • Efficiency (elimination of redundancy) <br><br> • Customer satisfaction <br><br> • Data transparency |

| Goal 6:   Provide an optimal level of service with available resources | |
|---|---|
| **STRATEGIES** | **METRICS** |
| 1.  Explore alternative revenue streams <br><br> 2.  Prioritize the service portfolio; engage clients <br><br> 3.  Look for automation opportunities <br><br> 4.  Track or estimate time/effort per service <br><br> 5.  Opportunities for shared efficiencies <br><br> 6.  See other goals for efficiency <br><br> 7.  Review outsourcing potential | • Customer satisfaction <br><br> • Resource levels <br><br> • Report projects completed <br><br> • Report progress toward other goals |

| Goal 7:   Develop a succession planning process and a near-term succession plan for Administrative Services | |
|---|---|
| **STRATEGIES** | **METRICS** |
| 1.  Investigate best practices <br><br> 2.  Design a target organization structure and roles/ responsibilities <br><br> 3.  Define a process (and maybe software) <br><br> 4.  Develop the succession plan for Administrative Services positions in the target structure <br><br> 5.  Professional development and internships | • Qualified candidates ready to assume positions when they open <br><br> • Time to fill openings |

## *Strengths/Weaknesses/Opportunities*

The following strengths will help implement the seven goals.  The weakness will hinder implementation, and the opportunities will help overcome the weaknesses.

| STRENGTHS | WEAKNESSES | OPPORTUNITIES |
|---|---|---|
| • Long time leadership in Administrative Services<br><br>• Team oriented and supportive<br><br>• Knowledge and expertise<br><br>• Technologically current | • Shortage of resources (people and money)<br><br>• Limited experience with change<br><br>• Uncertainty about expectations and assumptions of services provided or required<br><br>• Undefined communication workflow, processes and policies<br><br>• Short tenured leadership (projected retirements) | • "Can do" philosophy<br><br>• Open communication channels with key constituents<br><br>• Involve high potential employees in strategy implementation<br><br>• Reevaluate our division structure<br><br>• Account Managers |

## *Organization Structure and Roles/Responsibilities*

The following role and structure changes will help accomplish the goals and improve Administrative Services effectiveness with its clients.

### Account Manager Role

Directors will take on specific clients in Academic Affairs, Student Affairs , and others to represent Administrative Services to them and bring their needs back to Administrative Services.

### Cross-Divisional Teams

- Training
- Processes, policies, and procedures
- Report structure

# IV. Implementation Plan

The Implementation Plan translates each of the seven goals into year-by-year objectives with action plans to accomplish each objective. This implementation plan will be reviewed by the Administrative Services leadership team in its regular meeting to maintain accountability and track progress.

## *Annual Objectives and Action Items*

The following charts establish objectives by year for each of the seven goals and action items to achieve each objective. The *Resources Required* column is incomplete for lack of time, but when completed will identify the number of estimated person-days required. The *Priority* column represents a priority vote by the ten people on the leadership team. Each person voted high, medium, or low priority. A high vote counted as 2 points, a medium vote as 1 point, and a low vote as zero points. The highest score possible is 20.

Resource limitations may not permit all of the objectives to be accomplished in any one year. The priorities will help to determine which objectives and actions to address first. Priorities were established for 2011 only. The Administrative Services leadership team will update this plan each year and establish new priorities for the year.

| Goal 1: Develop a comprehensive training strategy and program for the university to build awareness, knowledge, and skills on Administrative Services and processes | | | | |
|---|---|---|---|---|
| **YEAR** | **OBJECTIVES** | **ACTION ITEMS** | **RESOURCES REQUIRED** | **PRIORITY** |
| 2011 | 1. Establish training team | 1. Ask for volunteers<br>2. Appoint team members and team leader | | 18 |
| | 2. Identify and prioritize training needs | 1. List services/processes, customers, skills required, known problems<br>2. Establish priorities with Administrative Services leadership team<br>3. Review with clients<br>4. Establish final priorities | | 18 |

## *Annual Objectives and Action Items (cont.)*

*Continued from previous page*

| YEAR | OBJECTIVES | ACTION ITEMS | RESOURCES REQUIRED | PRIORITY |
|---|---|---|---|---|
| **Goal 1:** Develop a comprehensive training strategy and program for the university to build awareness, knowledge, and skills on Administrative Services and processes *(cont.)* | | | | |
| 2012 | 1. Develop multi-year plan to create and deliver | 1. Inventory training materials/ programs we have and evaluate 2. Plan development or acquisition 3. Plan delivery 4. Estimate resource requirements | | |
| | 2. Deliver available training per plan | 1. Deliver available training per plan | | |
| | 3. Develop/acquire per plan | 1. Develop/acquire per plan | | |
| | 4. Establish tracking system | 1. Evaluate existing systems, e.g., D2L 2. Set up process and generate reports | | |
| | 5. Update plan and priorities (end of calendar year) | | | |
| 2013 & on | 1. Delivery | | | |
| | 2. Development | | | |
| | 3. Plan update | | | |
| | 4. Customer feedback | | | |

## *Annual Objectives and Action Items (cont.)*

| Goal 2: Define and document cross-divisional processes, policies, and procedures | | | | |
|---|---|---|---|---|
| **YEAR** | **OBJECTIVES** | **ACTION ITEMS** | **RESOURCES REQUIRED** | **PRIORITY** |
| 2011 | 1. Inventory MSUB processes, policies, and procedures | 1. Establish a SharePoint database<br>2. Each department populates the database with their relevant documents | | 18 |
| | 2. Identify and evaluate Bozeman and Board of Regents processes, policies, and procedures | 1. Each department identify relevant Bozeman and Board of Regents material<br>2. Each department complete a comparison matrix/spreadsheet | | 17 |
| 2012 | 1. Identify holes and deficiencies in MSUB processes, policies, and procedures portfolio | 1. Each department identify holes and assess deficiencies (use spreadsheet) | | |
| | 2. MSUB leadership sanction | 1. Take proposal to cabinet for cross-divisional processes, policies, and procedures | | |
| | 3. Priorities | 1. Departments assign priorities on processes, policies, and procedures they control | | |
| | 4. Multi-year Plan | 1. Departments create plans | | |
| | 5. Start filling holes and fixing deficiencies per plan | 1. Develop project plan per process<br>2. Assemble team<br>3. Do the work<br>4. Launch new processes, policies, and procedures | | |
| | 6. Review priorities | | | |
| 2013 & on | 1. Continue filling holes and fixing deficiencies per plan | | | |
| | 2. Review priorities each year | | | |

## *Annual Objectives and Action Items (cont.)*

| Goal 3: | Proactively engage and align with strategic planning and strategic initiatives at the MSUB, MSU, and regents levels | | | |
|---|---|---|---|---|
| **YEAR** | **OBJECTIVES** | **ACTION ITEMS** | **RESOURCES REQUIRED** | **PRIORITY** |
| 2011 | 1. Continue participation in MSUii and cross divisions  and master plan initiatives | 1. Already identified representatives | | Done |
| | 2. Establish liaison with strategic planning efforts at MSUB or division levels | 1. Identify Administrative Services liaison | | 5 |
| | 3. Gain support for Administrative Services strategic plan | 1. Review at cabinet<br>2. Use account reps to review at department level<br>3. Each department conduct internal review | | 20 |

## *Annual Objectives and Action Items (cont.)*

| Goal 4:  Create a safe, fun, and inviting working, living, and learning environment | | | | |
|---|---|---|---|---|
| YEAR | OBJECTIVES | ACTION ITEMS | RESOURCES REQUIRED | PRIORITY |
| 2011 | 1.  Complete classroom furnishing and technology projects in the pipeline | 1.  Existing plan | | Ongoing |
| | 2.  Continue identifying and mitigating safety issues; collect data and report | 1.  Continue investigation and mitigation 2.  Create an integrated reporting system | | 3 |
| | 3.  Identify deficient employee work environments and develop a plan and cost estimate | 1.  Identify top 10 across the University 2.  Develop a plan and budget for each | | 7 |
| | 4.  One work environment upgraded | 1.  Execute plan | | 8 |
| 2012 | 1.  Continue to implement classroom technology plan | | | |
| | 2.  Develop an instructional space utilization master plan | 1.  Develop inventory with capacities and utilization data 2.  Forecast future requirements 3.  Develop a utilization plan and instructional space design plan and budget | | |
| | 3.  Extend employee workspace plan per available resources | | | |
| | 4.  Implement • Instruction space plan • Work environment plan | | | |

## *Annual Objectives and Action Items (cont.)*

| Goal 5: | Create a standard dashboard reporting system for Administrative Services | | | |
|---|---|---|---|---|
| **YEAR** | **OBJECTIVES** | **ACTION ITEMS** | **RESOURCES REQUIRED** | **PRIORITY** |
| 2011 | 1.  Overall system design | 1.  Cross-department team <br>  • Identify desired reports <br>  • Evaluate existing reports <br>  • Design new report portfolio and data sources | | 13 |
| | 2.  Prioritize the work and develop a plan | | | 12 |
| 2012 | 1.  Execute the plan | 1.  Develop data warehouse <br> 2.  Develop input mechanisms <br> 3.  Develop reporting system | | |

| Goal 6: | Provide a optimal level of service with available resources | | | |
|---|---|---|---|---|
| **YEAR** | **OBJECTIVES** | **ACTION ITEMS** | **RESOURCES REQUIRED** | **PRIORITY** |
| 2011 | 1.  Prioritize services within each department | 1.  List and prioritize | | 9 |
| | 2.  Develop a baseline estimate of resource allocation | | | 12 |
| 2012 | 1.  Analyze opportunities to improve efficiency <br>  • Automation <br>  • Sharing <br>  • Outsourcing <br>  • Process reengineering | 1.  Each division analyzes own work <br> 2.  Divisions compare as a group | | |
| | 2.  Annual resource allocation across Administrative Services | 1.  Each department makes a proposal <br> 2.  Cross-departmental rationalization | | |
| | 3.  Research grant opportunities | | | |

## *Annual Objectives and Action Items (cont.)*

### Sample Resource Allocation Chart

This chart provides an example of a spreadsheet that could be used to estimate, allocate, and track Human Resources and money within Administrative Services and its departments per Goal 6.  The chart is divided into resources spent providing the portfolio of Administrative Services, Management, and Administrative overhead time within the division, and resources spent pursuing change and improvement initiatives such as the annual objectives identified in this strategic plan.

|  | 2011 | | 2012 | | 2013 | | 2014 | |
|---|---|---|---|---|---|---|---|---|
|  | HR | $ | HR | $ | HR | $ | HR | $ |
| **Services** |  |  |  |  |  |  |  |  |
| *A* |  |  |  |  |  |  |  |  |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| *B* |  |  |  |  |  |  |  |  |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| TOTAL SERVICES |  |  |  |  |  |  |  |  |
| **Management and Administration** |  |  |  |  |  |  |  |  |
| **Initiatives** |  |  |  |  |  |  |  |  |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |
| TOTAL INITIATIVES |  |  |  |  |  |  |  |  |
| **TOTAL** |  |  |  |  |  |  |  |  |

## Annual Objectives and Action Items *(cont.)*

| Goal 7: Develop a succession planning process and a near-term succession plan for Administrative Services | | | | |
|---|---|---|---|---|
| **YEAR** | **OBJECTIVES** | **ACTION ITEMS** | **RESOURCES REQUIRED** | **PRIORITY** |
| 2011 | 1. Investigate best practices | 1. Literature search<br>2. Site visits | | 8 |
| | 2. Short-term plan to fill near term replacements | 1. Identify who and when<br>2. Develop replacement plan | | 18 |

## Next Steps

This section identifies short term steps to complete this strategic plan. It will be dropped from the final document.

| **ACTIVITY** | **WHO** | **WHEN** |
|---|---|---|
| 1. Document draft report and e-mail to Terrie | Ray | 2/16/11 |
| 2. Directors review and send comments | | 2/24/11 |
| 3. Directors meet to review | | 2/25/11 |
| 4. Edit and develop PowerPoint | Ray | 3/4/11 |
| 5. Take to Cabinet | | 3/8/11 |

# Appendix:  Strategic Planning Process and Key Questions

I.   Current State Assessment

    a.   Context

- What context issues, trends outside your organization will affect your forward planning?
- What are the implications of each?
- How important?

    b.   Culture

- What cultural issues inside your organization and between your organization and others will affect your forward planning?
- What are the implications?
- How important?

    c.   Services

- What services are you offering now?
- How important, effective, and efficient is each of the services?
- What opportunities are implied by this assessment?

    d.   Biggest Current Challenges

- What are the biggest challenges faced by your organization today?
- What opportunities are implied by these challenges?

II.   Future State Design

    a.   Mission

- In one or two sentences, what ends does your organization serve, within what scope, and with what means?

    b.   Vision

- Tell a story about what a visitor to your organization would see in 3-5 years
- What do you want to be known for?

    c.   Values

- What are the high values/principles that you will expect members of your organization to use when solving problems and making decisions?

d.  Goals, Strategies, and Metrics

- Identify a set of high level goals, representing an end state that your organization will attempt to attain in the next 3-5 years?

- For each goal identify a list of strategies/means for attaining the goal

e.  Strengths/Weaknesses/Opportunities

- Given the goals and strategies that you have selected, what are the current strengths and weaknesses of your organization to work toward these goals?

- What opportunities are suggested by the strengths and weaknesses?

f.  Organization Structure and Roles/Responsibilities

- What changes in organization structure or roles and responsibilities will enhance the performance of your organization and facilitate the achievement of your goals?

III. Implementation Plan

a.  Annual Objectives and Action Items

- For each goal that you identified in the future state design, select an achievable set of objectives for each of the next several years

- For each objective, identify actions that you will take to achieve the objective

- Estimate the resources required to achieve each objective

- Establish priorities among the objectives for the first year

- Make a judgment about the achievability of the objectives and if necessary shift the lower priority objectives to the next year

b.  Next Steps

- What are the immediate next steps to take to get this plan approved and to share it with the people in your organization?