

FY07 B&F Strategic Framework – Status Report as of July 1, 2007

Three Major Goals

GOAL List the initiative number and title	INDICATOR List the indicator	METRIC List the measurement	FY07 TARGET List the target for fy07	STATUS/COMMENTS Report status. Include accomplishments beyond targets or issues that prevented achieving targets
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B&F GOAL #1 Provider of Choice	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Become the University's Provider of Choice for the UM services we offer	Customer Satisfaction	Overall Customer Satisfaction Index scores as tracked on the bi-annual B&F Customer Survey	5% improvement on June 2005 B&F Customer Overall Satisfaction Score (7.5) on March 2007 Survey	Overall improvement was not achieved. Overall B&F Satisfaction score dropped from 7.5 to 7.3.

B&F GOAL #2 Employer of Choice	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Become the Employer of Choice for high-performing staff members and teams	Employee Satisfaction	Overall Employee Satisfaction Index scores as tracked on the bi-annual B&F Customer Survey	5% improvement on February 2005 Overall B&F Employee Satisfaction Score (71) on March 2007 Survey	Overall improvement was not achieved. Overall satisfaction score (71) remained the same.
	Performance Feedback	Feedback on 6 leadership competencies	Improvement on individual professional development goals (360 feedback piloted with Senior Staff)	Per performance summaries

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GOAL #3 Best in Class Leadership	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
3. Demonstrate Best in Class Leadership in managing University Resources with respect to quality, cost, service and long term impact for the University	3.1 Using metrics to manage projects	The use of metrics to manage the FY07 B&F Top Ten Key Initiatives	Set and tracked specifically for each initiative	See below for FY07 B&F Top Ten Key Initiatives Status Summary
	3.2 Effective internal (B&F) implementation and early adoption of relevant University wide initiatives (See below for FY07 B&F Top Ten Key Initiatives Status Summary)	<u>B&F Top 10 Key Initiatives</u> (1.) Organizational competencies (2.) Active U participation (3.) % enrollment in Payroll controls (Internal controls) (5.) B&F Security Plan (9.) Energy conservation plan for B&F <u>U-wide initiatives</u> A. Conflict of interest/ Conflict of Commitment policies B. Tech tools policy C. Direct time and labor entry	<u>B&F Top 10 Key Initiatives</u> (1.) Begin to pilot organizational competencies in B&F units (2.) Increase to 30% Active U participation (3.) All B&F units complete gap analysis and identify plan (5.) B&F Security Plan developed (9.) Energy pilot underway in FAB <u>B&F Implementation of U-wide initiatives</u> A. Implement Conflict of Interest/Conflict of Commitment policies in B&F B. Finalize and implement tech tools policy in B&F C. Implement direct time and labor entry in B&F according to plan	<u>B&F Top 10 Key Initiatives</u> (1.) Achieved. Pilot begun (2.) Not achieved. (3.) Partially achieved. Expected to complete by August 31 (5.) Achieved. (9.) Achieved. Pilot underway <u>B&F Implementation of U-wide initiatives</u> A. Partially achieved. In progress B. Partially achieved. In progress C. Achieved.
	3.3 Efficiency of B&F processes	Improvement of business processes including reduction and or elimination of activities in order to self-fund innovations or new activities	HR – Implement temporary employment process MAIS - Increase discretionary work effort to 30% F&O - Streamline Plant Ops order fulfillment AVPF – Launch Project to Improve P-card and AP processes IO - Revamp documentation procedures in response to new audit standards	HR – Achieved. MAIS – Achieved. F&O - Not achieved. AVPF – Achieved. Project launched IO – Achieved. Implemented Salesforce
			Each AVP will demonstrate 4-6% total savings over 3 years (FY07-FY10)	Achieved. (On target per budgets.)

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Top Ten Key Initiatives

FY07 "Top Ten" Key Initiative #1	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 1: Develop leading practices in the recruitment, retention and development of outstanding faculty and staff. (Laurita Thomas)	Initiate the implementation of Organizational Competencies through a pilot program	Level of pilot program participation	Three major units are participating in the pilot.	Achieved. The pilot program exceeded the target. Seven units are participating: Ross School, School of Dentistry, all major B&F Units (F&O, MAIS, UHR, AVPF), UM Dearborn In addition, the integration of organizational competencies into the HRD management training curriculum and realignment of the HRD catalog using the model are 6 months ahead of schedule.
FY07 "Top Ten" Key Initiative #2	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 2: Integrate the benefits and wellness strategies to assure effective stewardship of university resources and support the well-being of the UM community. (Laurita Thomas)	Support high levels of participation by B&F employees in Active U	Active U participation levels	20% participation of eligible faculty and staff	Achieved. 7400 total participants U-wide 5406 participants Ann Arbor campus
	Establishment of Michigan Healthy Community as an ongoing program	Plans established	Implementation complete	Achieved. The MHCAC has been appointed and held 3 meetings to set foundation for development of the Culture of Health Strategic Plan.
	Launch of BCN transition	Plans established	Seamless transition for faculty and staff	Achieved. BCN transition plan on target, all milestones met.

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FY07 "Top Ten" Key Initiative #3	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
<p>Initiative # 3: Strengthen internal controls and improve the financial management of units.</p> <p>(Peggy Norgren)</p>	FY2006 Unit Certification of Internal Controls	Certification requirements completed and turned into AVPF	All units agree to certification requirements, sign certification and turn into AVPF by September 2006	Partially achieved. -All units confirmed (1) they are following stewardship responsibility; (2) committed to assess internal controls gap with the employment process; (3) appointed IT security liaison - All units but one confirmed that they had reviewed financial results; one unit had new financial person so was in process of reviewing financial results - 23 units confirmed that they had established COI/COC unit policy; 19 confirmed that their work on this was underway 30 units confirmed that they had reviewed and remedied issues raised in University internal audit reports from last FY; 4 were in process and 8 indicated that they had no reports in the last FY
	Internal Controls Manager	Internal Controls Manager in place	Complete Job Description Hire Internal Controls Manager to provide leadership for campus	Achieved. Brent Haase hired in January 2007 to lead effort; former Ford employee with extensive experience in the implementation of SOX in private sector as well as broad operational experience.
	Unit gap analysis for employment process as defined by AVPF and Internal Controls Committee	Education/clarification meetings with all Certifying Units	All Certifying Units meet with AVPF and/or Internal Auditor to review requirements, process and launch gap analysis to be completed by September 2007.	Achieved. All certifying units have met with Brent and/or myself (and Carol Senneff in many cases) to review requirements for gap analysis of employment process.

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FY07 “Top Ten” Key Initiative #4	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 4: Implement Business Intelligence Strategic recommendations that were agreed upon by the schools and colleges, Health System, and administrative Units (Laura Patterson)	Establish the Business Intelligence Competency Community	Level of participation	At least 15 people are actively participating in the Business Intelligence Council. At least 30 people are participating in periodic information sharing events through the Business Intelligence Community of Experts.	Achieved. BI Council (more than 15 individuals) has been established and meets regularly. Over 50 people attended the first BI Community of Experts meeting on March 13.
	Upgrade Business Objects to the Web	Upgrade complete	XIR2/Web1 is in production and corporate reports are converted. Users receive notification of the decommissioning of the old BO version six months prior to shut down.	Achieved. Go live occurred April 28 and full availability April 30. Support provided to units to assist with report conversion. The date for decommission of the old version was established
	Implement a Web reporting system	System is in production	Web reporting is in production with content for internal controls	Partially achieved. Web reporting infrastructure has been implemented and is stable for development and testing. Internal control reports are available in the data warehouse. Internal control reports delivered through Web reporting are in progress and expected this summer. Real Time Financials Phase I is complete. Phase I includes payroll, benefits, and financial aid projections in the data warehouse and unit defined commitments updated every hour. Phase II will include delivery through Web reporting.

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FY07 “Top Ten” Key Initiative #5	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 5: Implement the Information Technology Security Program to provide the University Community with a robust, scaleable security framework that mitigates risks and enables secure access to our information technology resources (Laura Patterson)	Establish a distributed organization with shared security responsibilities	Level of participation	At least 30 units participate in the first round of security planning workshops At least 50% of the participating units complete a security plan by October 1, 2006. At least 100% of the participating units complete a security plan by June 30, 2007. At least 100 trained security administrators are employed at the University on June 30, 2007.	Achieved. 38 units participated in security planning workshops. Achieved. 71% of participating units have submitted plans. Partially achieved. John King and Laura Patterson are currently following up with units that have not submitted plans. Partially achieved. 89 security administrators have been trained to date.
	Implement a University wide incident management program	Degree of compliance with SPG 601.25	The 30 units that participated in security planning workshops have assigned an incident reporting coordinator. The same 30 units have designed incident management procedures and communicated the program within their unit.	Achieved. Achieved.
	Increase the protection of personal private information (PPI)	Endorsement and approval	The University security community and the IT Security Council have endorsed the revisions to 601.12 and the information security guidelines. Data Stewards have approved SPG 601.12 and the related data classification guidelines.	Achieved.
	Publish a University-wide security plan	Security plan	A first draft of the university-wide security plan is developed by consolidating available unit plans by February 1, 2007. The plan is updated with subsequent unit plans by July 1, 2007.	Not achieved. February date was not achieved. Will not be complete by July.

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FY07 “Top Ten” Key Initiative #6	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 6: Support the Provost’s Space Utilization Project (Laura Patterson and Hank Baier)	Support project initiation	Project management, office and team	Assist the Provost’s office in naming a project manager. Assist the Provost’s office in identifying project space. Assist the Provost’s office in developing a communication plan.	Achieved. Project manager is in place. Achieved. Project office is in Fleming. Achieved. Communication plan is being developed. Website is in production and articles published in the Record and the AA News.
	Provide space utilization information to campus using existing data and reports to determine gaps in information	Reports Documentation on gaps	Classroom utilization reports are delivered to facilities and budget managers in the Deans’ Offices. Gaps in information are identified and documented. Approach for filling the gaps is identified.	Not achieved. The reports are ready but distribution to deans and managers has not started. Identification of gaps has not started because the reports have not been distributed. Determining the approach for filling the gaps in data has not been initiated. Project is behind schedule due to slow startup.
	Formalize capital projects guideline	Mapping current capital projects process; identifying gaps and formalizing process into new guidelines	Hire consultant to assist with information gathering and mapping current process Gather stakeholder input Draft of new guideline	Achieved. Consultant hired Achieved. Stakeholder input received and process mapping initiated Achieved. Reviewed and commented on straw model - distributed in May 2007
	Energy utilization	Information gathering	Assist in preparing materials for and attending focus groups meetings	Achieved. Focus group meetings held in May 2007

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FY07 “Top Ten” Key Initiative #7	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 7: Support the Residential Life initiative (Hank Baier)	Building gone	Frieze Building Demolition	May 2006	Achieved.
	Regent Action Item	North Quad design approval	December 2006	Achieved. New design goal added in March 2006. Regents approved new design in December 2006.
	Regent Action item	Mosher-Jordan Halls renovation/Hill Dining Center Project bid & aware approval	April 2006	Achieved.
	Regent Action Item	Mary Markley Infrastructure Upgrades –Regent Project Approval	September 2006	Achieved.
	Regent Action Item	Stockwell Hall Renovation Regent Project Approval	March 2007	Achieved.
	Project completion	Bursley Hall 2006 Infrastructure Upgrades and Dining Improvements	November 2006	Achieved. Dining facility recognized with <i>Washtenaw County Contractor’s Association Best Project Team Pyramid Award & Interior Design Award from Association of Interior Designers</i>
	Project completion	Oxford Housing Life Safety Project completion	September 2006	Achieved.

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FY07 “Top Ten” Key Initiative #8	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 8: Support Children’s and Women’s replacement hospital project (Hank Baier)	Regent Action Item	Regents approval to bid & award	November 2006	Achieved.
	Site work underway	Begin construction	February 2007	Achieved.
	AEC project tracking system	Owner changes and project tracking system in place	Changes are tracked in AEC project system	Achieved. New system in place.
	Meetings	Executive team meetings	Hold executive team meetings prior to construction	Achieved.
FY07 “Top Ten” Key Initiative #9	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 9: Lead Energy Conservation (Hank Baier)	Energy data for UM-AA campus	Trend energy consumption – btu/sf, total energy consumption, and energy costs/sf	By year-end	Partially achieved. The data has been collected, but not reconciled. Trend information will be available at a later date.
	Report	ISR energy study, phase I	Complete 4 buildings	Achieved. Fleming Building added for a total of 5 buildings in the ISR study
	Gather information	Identify sustainable energy use	Options identified for renewable energy credits and renewable energy	Achieved. Next step is to buy RECs and/or actually purchase renewable energy. Sources not currently available through energy provider.
FY07 “Top Ten” Key Initiative #10	INDICATOR	METRIC	FY07 TARGET	STATUS/COMMENTS
Initiative # 10: Implement actions to achieve the targets (all)	Employee and Customer Satisfaction as per Goals 1 and 2	Employee and Customer Satisfaction as per Goals 1 and 2	Overall B&F Employee Satisfaction and Customer Satisfaction score increases as described in Goals 1 and 2	Partially Achieved. Many actions were successfully implemented in advance of the two surveys, but the numeric goal for B&F for the two surveys was not met.