

FY 2008 B&F Strategic Framework Worksheet

B&F Three Major Goals

GOAL List the initiative or goal number and title	INDICATOR List the indicator	METRIC List the measurement	FY08 TARGET List the target for fy08	STATUS/COMMENTS A place to 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	FY08 TARGET (next survey March 2009)	STATUS/COMMENTS
Become the University's Provider of Choice for the UM services we offer	1.1 Customer Satisfaction	Customer Satisfaction Improvement Process	2009 Customer Survey targets set (AVP/unit) Related action plan(s) created and communicated to appropriate AVP staff	
	1.2 Coordination of Customer-impacting initiatives and improvements	Review of initiatives, timetables and customer impacts during CFO Senior Staff meetings and B&F Forum meetings to minimize customer impact	Monthly review during CFO Senior Staff meetings beginning in Sept, 2007 "Pop Up" reviews of new upcoming initiatives are held during B&F Forum sessions	

B&F GOAL #2 Employer of Choice	INDICATOR	METRIC	FY08 TARGET (next survey March 2008)	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	B&F Overall Employee Satisfaction score remains the same or improves.	
		Employee Satisfaction Improvement Process	All units will have action plans prior to the March 2008 survey to sustain or improve their scores towards a goal of 73 by the next survey, March 2010.	

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GOAL #3 Best in Class Leadership	INDICATOR	METRIC	FY08 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 Effective internal (B&F) implementation and early adoption of relevant University wide initiatives (See list below of Key Initiatives)	<u>B&F Internal Implementation of Key Initiatives</u> Wellness	<u>B&F Internal Implementation of B&F Key Initiatives</u> All B&F members of the B&F Forum have participated in the e-learning training programs addressing workplace stress, mental health and substance misuse.	<i>Each AVP responsible for tracking and status of B&F implementation of their Key Initiative and informing the others about progress</i>
		Internal controls	0% of all B&F units respond "No" across all categories on the September 2007 unit certification.	
		IT Security Y	IT risk assessments have been performed on <u>at least 5</u> B&F units.	
		<u>B&F Internal implementation of U-wide Initiatives</u> Diversity Blueprints	<u>B&F Implementation of U-wide initiatives</u> B&F will have a plan of action for the B&F response to the Faculty and Staff Subcommittee Report of Diversity Blueprints by January 15, 2008.	
	3.2 Budget	Implement cost reductions to base operating budget through efficiencies in order to self-fund innovations or new initiatives	4-6% total savings from FY07-FY09.	<i>Each AVP responsible for tracking in their work plan and budget process</i>

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B&F Key Initiatives

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FY08 Key Initiative #1	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 1: Develop leading practices in the recruitment, retention and development of outstanding faculty and staff. LAURITA	Develop and implement training, templates and web-based technology that will enhance performance management practices in UM units.	Training, templates and web-based technology are available, communicated to units, and access is provided by UHR.	Implementation completed.	

FY08 Key Initiative #2	INDICATOR	METRIC	FY08 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	2.1: Obtain approval and funding for a 5-year strategic plan to optimize the health and well-being of faculty, staff, dependents and retirees, maximize the value of our health care resources and contain health-related costs.	Strategic Plan approved.	Plan established and early implementation of key objectives in process according to the strategic plan timeline.	

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Initiative # 2: (cont)	2.2: Offer enhanced management, supervisory and human resources training in addressing workplace stress, mental health and substance	E-learning training program offered to UM managers, supervisors and HR professionals.	5% of UM managers, supervisors and HR Professionals have participated in the e-learning training.	
	2.3: Successfully integrate a health claims data warehouse to enable us to better plan and evaluate our health improvement and cost management strategies.	Data warehouse vendor selected and initial implementation accomplished.	Data warehouse vendor selected and database implemented.	

FY08 Key Initiative #3	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 3: Strengthen internal controls and improve the financial management of Employment, Procurement and Cash Handling PEGGY	3.1 FY2007 Unit Certification	Certification requirements completed and turned into AVPF.	All units agree sign certification and turn into AVPF by October 2007. Less than 15% of all responses are "no" in any category.	
	3.2 Controls evaluated and expectations shared for employment, procurement and cash handling	Internal control adequacy matrix available to units for control purposes.	3 Matrices utilized for 2008 certification: -Employment matrix updated. -Cash Handling matrix completed. -Initial Procurement matrix drafted with process changes planned/PCard section of matrix completed.	

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FY08 Key Initiative #4	INDICATOR	METRIC	FY08 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	4.1 BI products and services are in production.	Web reporting is in production for financial users.	Information on employment/payroll internal controls is provided to organization certifiers. Project budget summary reports are available to research faculty and research assistants. Source/use statements and statement of activity for all funds are available to all financial managers.	
	4.2 Staff from academic, administrative and health system units actively participate in the BI Community.	Participation in the BI community exceeds FY 07 levels.	The BI Community of Experts holds at least 8 major BI events with at least 30 participants. 50% of people who visit the BI Website will return for a subsequent visit.	

FY08 Key Initiative #5	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 5: Implement the Information Technology Security Program LAURA	5.1 Information Technology security management and practices are part of units' standard operating procedures.	IT security risk considerations are integrated into the unit decision-making processes. Security metrics provide useful information to unit and executive leadership to influence process improvements.	95% of units on the AVPF Certification List have submitted a security plan that has been approved by the Dean or Director. A major college collaborates with ITSS to complete a risk assessment cycle. Security metrics are established and reported to executive sponsors and deans two times during the year.	

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FY08 Key Initiative #6	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 6: Design and implement Enterprise Wide systems (E-research and Development) LAURA	6.1 eResearch System	eResearch is in production and available to researchers and research administrators.	eResearch Proposal Management Phase I is stable and available to all researchers and research administrators. Production functionality includes ePAF, Grants.gov, award notification, & data warehouse.	
	6.2 Contributor Relations/Fundraising System	Contributor Relations/Fundraising System is in development on target for implementation in FY09.	Software selected and contract signed. Capital and production support funding approved. Software development is in progress.	

FY08 Key Initiative #7	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 7: Support the Provost's Space Utilization Project LAURA and HANK	7.1 Deliver class and event scheduling and space utilization information.	Enterprise-wide class and event scheduling system is in production.	Software solution selected and in development.	
		Classroom utilization data are available to deans and facilities managers.	Class utilization metrics are defined and are being developed.	

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FY08 Key Initiative #8	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 8: Implement Major Capital Projects (Residential Life Initiative, Children and Women's, Stadium) HANK	8.1 Children and Women's (C&W) Schedule	(1) Completion of construction documents for total building.	January 2008.	
		(2) Steel erection complete (east and mid section).	June 2008.	
	8.2 Michigan Stadium Schedule	Utilities & foundations completed.	May 2008.	
	8.3 North Quad Schedule	(1) Completion of construction documents for all bid packages.	May 2008.	
		(2) Construction completion for foundation.	May 2008.	
	8.4 Renovate Mosher Jordan Halls	Substantial completion.	June 2008.	
	8.5 Renovate Stockwell Hall	Regent approval to bid & award.	May 2008.	

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FY08 Key Initiative #9	INDICATOR	METRIC	FY08 TARGET	STATUS/COMMENTS
Initiative # 9: Begin six point Environmental and Energy Initiative HANK	Report	Produce first annual environmental report and make available to the public.	November 2007.	
		Wolverine Teams have performed building energy use assessments, engaged building occupants as identified in the methodology, and implementation is underway for five pilot buildings (Fleming, ISR, Chemistry, Space Research and Rackham).	November 2007.	
		Wolverine Teams have performed building energy use assessments, engaged building occupants as identified in the methodology, and implementation is underway in 12 additional buildings.	June 2008.	