



Strategic Planning – Beginning the Journey

VISION *INSPIRING ♦ OUR ASPIRATIONS ♦ WHAT WE WILL DO TO SERVE THE ORGANIZATION ♦ OUR LEADERSHIP LEGACY*

President Mary Sue Coleman’s Vision (Regental presentation, April 22, 2004):

- Continue to define the great public University of the world.
- Move Michigan to a new level of excellence.
- Expand the collaborative innovation that is our signature

President Mary Sue Coleman’s Strategies:

1. Sustain academic excellence
2. Foster active engagement
3. Build collaborative learning communities
4. Create greater access to Michigan’s academic quality (including creating a campus that is truly reflective of and supportive of diversity)

<http://www.umich.edu/pres/visions/index.html>

President Coleman’s Key Initiatives:

1. Residential Life
2. The study of ethics in the public domain
3. New approaches to affordable health care
4. Multi-disciplinary and team teaching

http://www.umich.edu/pres/visions/vision_initiatives.html

B & F Vision

We will become a high-performance organization by:

- Being known for our deep expertise (both technical and business)
- Demonstrating (via assessment and service) our understanding of the University’s businesses
- Serving as fiduciaries of the University assets (physical, financial, human, information and technology assets)

VALUES BELIEFS, ORGANIZATIONAL PRINCIPLES & ETHICAL STANDARDS ♦ GUIDANCE FOR DECISION MAKING ♦ CONSISTENCY AND ALIGNMENT BETWEEN STATED ORGANIZATIONAL VALUES AND BEHAVIORS IS VITAL

B & F Values

1. Respect and Diversity
2. Ethics and Integrity
3. Innovation
4. Collaboration
5. Professional Growth and Development
6. Quality and Customer Service
7. Health, Safety and Environment
8. Community

MISSION WHAT WE DO ♦ THE REASON A DIVISION, UNIT OR DEPARTMENT EXISTS ♦ A MISSION IS SOMETIMES ENCAPSULATED IN A MOTTO OR SHORT SLOGAN

University Mission

The mission of the University of Michigan is to serve the people of Michigan and the world through preeminence in creating, communicating, preserving and applying knowledge, art, and academic values and in developing leaders and citizens who will challenge the present and enrich the future.

- Teaching, Research, Service, Patient Care

B & F Mission *(Developed through BF Mission/Values focus groups)*

We partner with the University community to provide the technical, financial, physical, information and human resource infrastructure essential to being a great public university of the world.

B & F Motto ***We Make Blue Go.*** *(We give credit to Tim Kennedy from Plant Operations for coming up with the idea initially.)*

GOALS MEASUREABLE ♦ IMPLY PRIORITIES ♦ BROADLY ENCOMPASSING ♦ "SCORECARD" ♦ DRIVE INITIATIVES AND PROJECTS ♦ RESULTS ON MEASURES TRACKED YEAR TO YEAR

B & F Goals *(These are the first two of what will probably eventually be four or five overall)*

-Become the University's PROVIDER of CHOICE for the UM services we offer

(Measures and targets to be developed in FY05 based on BF-Wide Customer Satisfaction surveying – January – April, 2005)

-Become the EMPLOYER of CHOICE for high performing staff members and teams

(Measures and targets to be developed in FY05 based on BF-Wide Employee Survey Questions – January 24 – February 4, 2005)

Measures = contain specific numeric metrics you are tracking

Targets = specific goals for the metrics – may be aspirational or annual

STRATEGIES DEFINE THE METHODS BY WHICH THE BUSINESS AND FINANCE ORGANIZATION ACCOMPLISHES THE PRESIDENT'S AND THE ORGANIZATION'S VISION AND GOALS

B & F Strategies

- 1. Work in a collaborative manner to meet customer needs*
- 2. Leverage technology investment for strategic gains and operational efficiency*
- 3. Attract, develop, retain and invest in highly-productive and diverse staff*
- 4. Develop and expand programs that promote good stewardship of our resources and protect the citizens of our community*

FY05 - 12 KEY INITIATIVES

REFLECTIONS OF THE STRATEGIES ♦ MOST STRATEGIC FOR BF TO BE SUCCESSFUL OVERALL (IN ADDITION TO OPERATIONAL PRIORITIES) ♦ NEED EVERYONE'S SUPPORT ♦ SIGNIFICANT CHANGE FOR USERS OR BROAD IMPACT ON THE UNIVERSITY

B & F Key Initiatives for FY05

1. *Implement Classification System* LT
2. *Support the President's Health Initiative (integrating closely with the Benefits Design effort)* LT
3. *Strengthen internal controls and improve the financial management of units* PN
4. *Define the framework for a Business and Finance "Strategic Integrated Consulting" service for the University* LP (w/LT, PN, HB, CL)
5. *Develop a Strategy for Delivering Business Intelligence that is agreed upon by the schools and colleges, health systems and administrative units* LP
6. *Improve the security of the University's information technology resources* LP
7. *Establish the priorities for Central Campus Planning and successfully launch the priority projects* HB
8. *Exploit e-Business opportunities* LP
9. *Support the Residential Life initiative* HB
10. *Implement strategies for investments to maintain the level of return* EL
11. *Develop Voice of the Staff Initiative* LT
12. *Implement recommendations from the lab renovation project and related initiatives to enhance accountability for construction costs per square foot, for appropriate stakeholders* HB