



Office of Business and Finance

Strategy Workshop 2014

May 19, 2014



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Introduction

Dear Reader:

During the spring of 2014, departments within Business and Finance met to share and celebrate our top strategic accomplishments from the past 18 months. It was inspiring and invigorating to review these highlights of the past year.

Departments also shared their top three goals for the next one to two years. I am encouraged to see how we build upon our past successes to further improve our services to the University community and continue to bring our vision to life.

We concluded this year's strategy workshop discussing how the Central Office can more strategically serve the wide range of needs of our departments. What we clearly heard was that while we have been doing many things well, there are some areas where Central Office leadership can strengthen their support to all of Business and Finance. This report documents the top accomplishments and the recommendations for the Central Office.

As we continue on our strategic journey, Business and Finance remains committed to our vision. It embodies the spirit of who we are and what we want to be. It is hoped that this report is useful to you in understanding how Business and Finance is moving along the path of continuous improvement. The process is evolutionary and we continue to build on the foundation that has been laid so that we can continue to advance the University's mission and vision.

Warmest regards,

Jan Van Der Kley

Vice President for Business and Finance



Business and Finance Guiding Principles

Mission

The mission of the Office of Business and Finance is to provide leadership and stewardship over WMU's fiscal, physical, and human capital so that all members of the University community can accomplish their learning, teaching, research and public service goals in safe, healthy, sustainable and attractive settings at reasonable costs.

August 2009

Vision

As the foundation that advances the University's mission and vision, Business and Finance will:

- **Exceed expectations** as an integrated partner with campus and the community;
- **Shape Western's culture** by embracing differences, pursuing equity, fostering human dignity, acting with integrity, and promoting personal development;
- **Positively impact life at the University** by being thought leaders and engaged members of the campus community.

January 2012

Core Values

As members of the Office of Business and Finance, we exemplify these values in everything we do:

- Wellness and Health
- Sustainability
- Diversity and Inclusion
- Ethics
- Respect
- Professionalism
- Equity

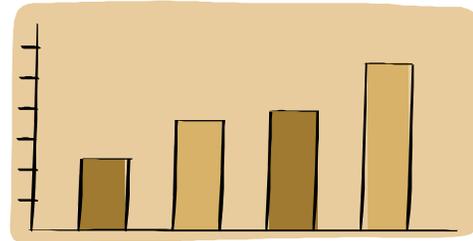
August 2009



Top Accomplishments for 2013-2014

Department and division heads presented the following top accomplishments for the past 18 months.

Departments were asked to present only a single top accomplishment. The report "Strategic Action Plans 2014" documents additional accomplishments related to each department's strategy implementation progress.



Department	Accomplishment	Measurable Impact
Accounting Services	Expand ACH payments	<ul style="list-style-type: none"> Increased percentage of funds paid by ACH from 5% in 2011 to 15% in 2014. Reduced check payments from 72% in 2011 to 62% in 2014.
Auxiliary Enterprises University Bookstore	Engaged Follett Higher Education Group to manage the University's Bookstore	<ul style="list-style-type: none"> Net profit increased by \$1 million Reduced cost to students by over \$500,000 by offering 2,500 rental titles vs. 500 in the past
Auxiliary Enterprises Technology	Technology Purchase process & website – Departmental technology purchases was revamped in fiscal year 2013/2014. Auxiliary Enterprises helped streamline an approval process through a departmental technology purchases portal that resulted in the benefits outlined on the right.	<ul style="list-style-type: none"> A simple system for manager approval and LAN manager notification of any technology purchases. Leading all University purchases towards energy efficient standards of computer equipment. Provided higher discounts from vendors to departments rather than taken as a profit. Negotiated part of DCP purchase from \$609,000 to \$516,000; a savings of \$93,000 (15.2% discounted pricing) from the initial WMU listed price. The approval process that reduces the need for any paper approval. Total amount of purchases \$2,755,000.
Auxiliary Enterprises West Hills Athletic Club	Hired a junior tennis director that created confidence in the junior tennis program and grew additional tennis revenue	<ul style="list-style-type: none"> Increased tennis revenue over last 5 years to \$236K (58%)



Department	Accomplishment	Measurable Impact
Auxiliary Enterprises Miller Auditorium	Hired a development person to help in changing the current funding model	<ul style="list-style-type: none"> Breaking even this year – quite the accomplishment considering there was no major Broadway show in the program Started “Miller on the Road:” taking shows on the road to communities that typically would not be able to bring and afford these types of shows
Auxiliary Enterprises Marketing	Transportation survey – a university wide survey that included input from Parking Services, Sustainability and Bronco Transit Migrated more departments to WMU content management system	<ul style="list-style-type: none"> Students are aware of the services, GPS, and ride the bus
Auxiliary Enterprises Fetzer Center	Hired outside sale representative Created a line of baked goods called Fetzer Temptation to generate additional revenue	<ul style="list-style-type: none"> New clients have been booked
Auxiliary Enterprises Lawson Ice Arena	Added high school and club hockey during the spring and summer.	<ul style="list-style-type: none"> Revenue doing well as Wings has pulled back on use of their ice surfaces and raised rates
Auxiliary Enterprises Pilot Plants	Added numerous new clients.	<ul style="list-style-type: none"> Revenue increased by \$562K (45%) over prior year. Successful year in securing donated pulp valued at \$38K
Business Services	Education of faculty and staff about risk management issues through seminars, workshops, and newsletters.	<ul style="list-style-type: none"> Nine trainings, meetings, workshops, seminars, webinars 14 newsletters
Central Office	Travel and expense reporting survey	<ul style="list-style-type: none"> Traveler feedback provided the necessary information needed to develop new travel policies and will assist in the development of a new online travel authorization system. Customer feedback from changes is positive.
Community Outreach	Completion of phase I of the WMU BTR Park with the successful recruitment of Newell Rubbermaid and the confirmed construction schedule of Mophie	<ul style="list-style-type: none"> 42 companies located in the WMU BTR Park When Newell Rubbermaid and mophie are fully employed there will be close to 1,000 employees in the BTR Park, not counting WMU faculty and staff
Facilities Management Landscape Services	Proud recipient of the Tree Campus USA Designation for the sixth straight year since its conception by the Arbor Day Foundation	<ul style="list-style-type: none"> For every tree removed because of storm damage, health and safety, dead, and construction projects, we plant two trees (2 for 1) thus fostering a healthy and sustainable campus



Department	Accomplishment	Measurable Impact
Facilities Management Custodial Services	Roll-out of the process cleaning procedures	<ul style="list-style-type: none"> 44% increase in employee productivity
Facilities Management Projects and Construction	Initiated data collection system for STARS program	<ul style="list-style-type: none"> New levels of recycled material vs. waste material sent to landfills.
Facilities Management Power Plant	Now in its 12th year, the apprenticeship program underwent a major change this past year that saw its classroom training requirements for future apprentices increase 40%. This was achieved through a collaborative Labor-Management effort done to reflect both changes in class offerings at RMTC as well as to further develop a more versatile, skilled journey person capable of addressing virtually any power plant need 24/7/365.	<ul style="list-style-type: none"> The required hours for the mechanic went from 1249 to 1647 and for the electrician from 1028 to 1530 – an overall average increase of 40%.
Facilities Management Engineering Division	Created Facility Guidelines for Exterior, Interior Lighting Standards, Storm Water and Building automation Guidelines Update for Exterior and Interior Design Professionals	<ul style="list-style-type: none"> No success metrics at this time.
Facilities Management Maintenance Services	Created and implemented a process to measure web request process time from campus community	<p>Since implementation - average web request process time:</p> <ul style="list-style-type: none"> Nov 2013: 10.92 min December 2013: 5.32 Jan 2014: 8.61 Feb 2014: 4.1 March 2014: 3.8 April 2014: 3.59
Facilities Management Transportation Services	Recycling our paper, cardboard, plastic, batteries, antifreeze, and all of our used oil; we even crush and then recycle old filters. The old waste tires are either recycled or reclaimed and the large truck tires are recapped whenever possible. Our goal is to keep as much from going to the landfill as possible.	<ul style="list-style-type: none"> 93 gallons of Antifreeze recycled 1,430 gallons of used oil recycled 2 - 55 gallon barrels of crushed oil filters recycled 144 used tires recycled or reclaimed



Department	Accomplishment	Measurable Impact
Facilities Management Planning Division	New Dining Facility - Recommended a design change that eliminated one elevator and still met project goals and function.	<ul style="list-style-type: none">Estimated \$150,000 savings to projectUndetermined savings to operations
Human Resources	Implemented a new employee orientation program	<ul style="list-style-type: none">Provide excellent "first day experience for all new faculty and staff, standardizing the on-boarding process with the help of a cross-function team"
Logistical Services	Implemented a Gain Sharing agreement as part of the Employment Group Managed Services contract. Shared savings on labor cost as available.	<ul style="list-style-type: none">Savings accrued over the first year.
Public Safety	WMU Alert: Researched, analyzed, recommended, tested, implemented, and trained dispatchers and officers, and rolled out a new emergency notification system that included text messaging	<ul style="list-style-type: none">Over 18,000 students, faculty, and staff registered to receive WMU Alert notifications



Central Office Kudos and Wish Lists

This year's breakout session centered around the services provided by Central Office to all other Business and Finance departments. Five breakout groups discussed the following three aspects of Central Office services.

Kudos

The services provided by the Central Office of Business and Finance touch everyone at the OBF. The quality of their work and leadership set the tone for the entire organization. Groups recounted their best experience with Central Office over the past 12 months and which support had the biggest positive impact on their operations.

Short-term Wish List

Groups discussed what they want to accomplish in the next 12 months and how Central Office could support them in achieving short-term goals. Groups members could list things they wanted the Central Office to do more of, do differently, or stop doing altogether.

Mid-term Wish List

Looking out a couple of years, groups explored which Central Office support would be most meaningful in the next 12 to 24 months.





Kudos

Group 1	Group 2	Group 3	Group 4	Group 5
<p>Easily Approachable</p> <p>Quick response time</p> <p>More online - easier to find</p> <p>More reliance on the team for accurate information - input seeking</p> <p>Global View - share information</p>	<p>Accessibility</p> <p>Quick Response</p> <p>Clarity of response</p> <p>Thoughtful responses</p> <p>Working for Good of the Cause</p> <p>Seek input from all</p> <p>Patient and Educate</p> <p>Have your Back</p>	<p>Ability to recognize when fast tracking is necessary</p> <p>Openness to deal with existing issues</p> <p>Reaction to developing emergencies</p> <p>Positive attitude</p> <p>Open to input from Stakeholders</p> <p>Good Communication</p>	<p>Knowledgeable Gate Keeper</p> <p>Approachable</p> <p>Financial support</p> <p>Deep knowledge</p> <p>History</p> <p>Makes decisions</p> <p>Risk takers</p> <p>Sincere</p> <p>Supportive across SLT/VP</p> <p>Strong Leader</p> <p>Influential</p> <p>Cares</p> <p>Passionate</p> <p>A true Bronco</p> <p>Good listener/and willing</p> <p>Quick Response</p> <p>Calming and re-assuring</p> <p>Leads by example</p> <p>Professional appearance "stylin"</p> <p>Fun</p> <p>Open to change</p> <p>No death by committee</p>	<p>Accessibility</p> <p>Efficient Signature Workflow</p> <p>Follow up Communication</p> <p>Excellent Beyond 8 - 5</p> <p>Thoughtful Questions and Challenges</p> <p>Seek input</p> <p>Supportive of our needs</p> <p>Bridge to other VP's & President's Office</p> <p>Disburse Kudos</p> <p>Strategic Planning & Professional Development</p> <p>Finger Pointing - Refrain</p>





Near-term Support

Group 1	Group 2	Group 3	Group 4	Group 5
<ol style="list-style-type: none"> 1. Better communications across OBF - more sharing of information - division updates 2. Streamline/condense process - quicker/easier - too much shared governance 3. Ask Jan <ul style="list-style-type: none"> • Travel • Human Resources • Residency • Parking • Contracts <p>Accomplish more by doing more without - redundancy</p> <p>If crossing VP lines: when to involve OBF VP</p>	<ol style="list-style-type: none"> 1. Training - Provide for Support 2. Find Open Positions where possible 3. Workflow Automation Enhancement - Electronic Signatures 	<ol style="list-style-type: none"> 1. Continued support for collective bargaining 2. Better long term planning and communication 3. Better engagement from OBF in Enrollment & Retention <p>Continue to break down silos</p>	<p>Increase/improve technology use</p> <p>Implement electronic signature policy</p> <p>Interaction with entire staff "Family" of OBF</p> <p>Technology financial support - phones</p> <p>Less meeting/Revamp all meeting objectives</p> <p>More professional development</p> <p>More meetings/pattern interrupt</p> <p>More interaction with other VP areas and within OBF</p>	<ol style="list-style-type: none"> 1. New two-way Radios 2. Clarify policy exceptions 3. Alignment of operational needs and CBA goals

Note: Not all groups indicated their top three near-term support "wishes."



Mid-term Support

Group 1	Group 2	Group 3	Group 4	Group 5
<ol style="list-style-type: none"> 1. Continuity/Succession Plan - earmark 2. Better mentoring program/empowering throughout the organization 3. More training/delegating more tasks down - need more buy in through the ranks <p>Advancement paths More student internships - UG & GR More decision-making authority down / hierarchy of decisions</p>	<p>Review/Enhance Distributed Time Entry System (KRONOS) - Employee Access - increased employee participation Business & Finance Facilities Upgrade Increase spirit of cooperation among Different Divisions/Departments Continue Technology Upgrades</p>	<ol style="list-style-type: none"> 1. Promote the Next Generation of Communication Technology 2. Continue to support compensation for recruitment and retention 3. Strategic Planning is aligned with Central University issues like enrollment <p>Creative Compensation systems Centralized Budget</p>	<p>More input by "all" Increase "Bronco Pride" Delegating to subject matter experts OBF "social gathering" for team building Wellness/Health Flexibility reporting for hours worked Increase interaction with student/job shadow, hire, "adopt" Participate in community - adopt freeway, Doo-Dah Parade, Christmas, etc, ministry with community, missions, salvation army Remaining economically viable</p>	<p>More training or Professional development resources Intervention with Space Management Communication Bridge with enrollment management Merit/Recognition for high performers PICK OUT COLORS!</p>

Note: Not all groups indicated their top three mid-term support "wishes."



Themes: Short-term Support

Short-term support wishes centered around making life easier for the departments through streamlining and technology enhancement as well as clarifications to be provided by OBF leadership. Communication was also an area where increased or different support is desired.

Streamlining and Technology	Leadership	Communication	Personnel	Staff Development
<ol style="list-style-type: none"> 1. Accomplish more by doing more without - redundancy 2. Continue to break down silos 3. Implement electronic signature policy 4. Increase/improve technology use 5. Less meeting/Revamp all meeting objectives 6. New two-way Radios 7. Streamline/ condense process - quicker/easier - too much shared governance 8. Technology financial support - phones 9. Workflow Automation Enhancement - Electronic Signatures 	<ol style="list-style-type: none"> 1. Alignment of operational needs and CBA goals 2. Ask Jan 3. Clarify policy exceptions 4. If crossing VP lines: when to involve OBF VP 5. More interaction with other VP areas and within OBF 	<ol style="list-style-type: none"> 1. Better communications across OBF - more sharing of information - division updates 2. Better long term planning and communication 3. More meetings/pattern interrupt 	<ol style="list-style-type: none"> 1. Continued support for collective bargaining 2. Find Open Positions where possible 3. Interaction with entire staff "Family" of OBF 	<ol style="list-style-type: none"> 1. More professional development 2. Training - Provide for Support
				Other
				<ol style="list-style-type: none"> 1. Better engagement from OBF in Enrollment & Retention



Note: Items are listed in alphabetical order.



Themes: Mid-term Support

While leadership direction affects each mid-term support wish, the thematic analysis shows that leadership-related items were listed most frequently. Personnel and staff development items are more numerous in the mid-term support category than in the short-term category. This may reflect the need for recruiting and keeping qualified staff because in an era of diminishing resources departments throughout the University have to do more with less.

Leadership	Personnel	Staff Development	Streamlining and Technology	Other
<ol style="list-style-type: none"> 1. Centralized Budget 2. Continuity/Succession Plan - earmark 3. Delegating to subject matter experts 4. Increase "Bronco Pride" 5. Increase spirit of cooperation among Different Divisions/Departments 6. More decision-making authority down / hierarchy of decisions 7. More input by "all" 8. Strategic Planning is aligned with Central University issues like enrollment 	<ol style="list-style-type: none"> 1. Continue to support compensation for recruitment and retention 2. Creative Compensation systems 3. Flexibility reporting for hours worked 4. Merit/Recognition for high performers 5. Participate in community - adopt freeway, Doo-Dah Parade, Christmas, etc, ministry with community, missions, salvation army 6. Review/Enhance Distributed Time Entry System (KRONOS) - Employee Access - increased employee participation 7. Wellness/Health 	<ol style="list-style-type: none"> 1. Advancement paths 2. Better mentoring program/empowering throughout the organization 3. More training or Professional development resources 4. More training/delegating more tasks down - need more buy in through the ranks 5. OBF "social gathering" for team building 	<ol style="list-style-type: none"> 1. Continue Technology Upgrades 2. Promote the Next Generation of Communication Technology 	<ol style="list-style-type: none"> 1. Business & Finance Facilities Upgrade 2. Communication Bridge with enrollment management 3. Increase interaction with student/job shadow, hire, "adopt" 4. Intervention with Space Management 5. More student internships - UG & GR 6. PICK OUT COLORS! 7. Remaining economically viable



Recommendations

It is our recommendation that Central Office leadership develop a 12-months action plan that addresses the short- and mid-term “wishes.”

It would be unreasonable to expect that all recommendations can be accommodated, at least not in the timeframe under consideration. We recommend, therefore, that a draft of the plan with prioritized action items and suggested target completion dates be reviewed with senior staff during a regular leadership meeting.

This two-way communication (which is already well established within the Office of Business and Finance) and continuous improvement allow Central Office leadership to focus the support and direction needed to enable all departments to perform at highest levels and serve their University customers to the highest degree possible.



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