

Business and Financial Affairs (BFA): 2019-21 Strategic Plan Highlights for UPRC

Strategic Priorities

(Connection with the University's Strategic Plan noted in parentheses, e.g. "Objective 2.B").

1. Partner with our Western community in planning and implementing changes in support of Western's 2025 vision. (All Goals and Objectives)
2. Communicate effectively with our Western community. (All Goals and Objectives)
3. Support Western's goals for diversity, inclusiveness and sustainability (Objective 2.E and Objectives 4.A, 4.B, 4.D, 4.G).
4. Develop, support, and empower Business and Financial Affairs teams and staff to achieve excellence status. (Objectives 3.B, 3.D, 3.E, 3.F)
5. Continually improve and innovate business practices and systems. (Objective 1.C, 1.F, 1.G)

BFA's SCOT Analysis: Top Opportunities

1. **The University will Require Increased Services to Deliver the 2025 Strategic Plan and Vision**

The University's goals are ambitious. The opportunities that arise from it are to:

- a. Develop a Resource Plan in support of the new Strategic Plan
- b. Expand support and services for Western's employees and students
- c. Improve collaboration with university stakeholders
- d. Expand efforts to measure service delivery and customer satisfaction

2. **Improve and Develop Administrative Systems and Best Practices**

BFA has implemented many systems and processes over recent years. The opportunity is to realize the benefits of these and to avoid complacency: to streamline existing processes and practices, use new data to measure performance and assess risk, and continuously improve how we deliver services to campus.

3. **External Partners are Open to Improving Access to and Circulation on Campus**

Campus stakeholders agree that pedestrian, vehicle, and bicycle flow and interactions could be improved. With a shared impetus for change, BFA will be able to move forward.

4. **Developing Initiatives in Support of the University's Emphasis on Sustainability**

With the University's ongoing emphasis on sustainability, BFA will be able to develop more initiatives, many through campus partnerships. We have actively considered and incorporated the University's Sustainable Action Plan in our strategic plans.

BFA's SCOT Analysis: Top Challenges

1. **Staff Recruitment, Retention and Morale**

BFA, like many divisions, faces ongoing challenges with respect to hiring and retaining employees, including addressing diversity. There often is a lack of opportunities for growth and movement in positions, and a need to improve timeliness of recruitment of skilled positions. Job satisfaction, trust and morale are not consistent across all of BFA.

2. **Communications Within BFA and With University Stakeholders**

Communications could be improved within the division, out to campus, and up and down in the organization. Improvements must be made so that faculty and staff understand information that affects them, and are engaged in planning processes and upcoming initiatives.

3. Maintaining Adequate Facilities and Equipment

Our aging buildings and facilities provide an ongoing challenge, and pose financial and reputational risks. The University's strategic plan and related growth plans will place additional strains on current facilities already under pressure.

4. Developing a Living Long Term Comprehensive Facilities Development Plan

The University's long-term development, capital planning, and facilities management efforts are currently handled separately for academic buildings, and the various auxiliaries including housing and dining, the Recreation Center, the VU, and parking. We need to develop an on-going, long term, and comprehensive facility plan that supports Western's 2025 vision.

5. Constant and Increasing Technological and Operational Change

BFA and the University have recently undergone numerous system implementations; it is clear from the experience that this change saturation has impacted our workforce. The challenge remains about how to continuously improve, yet make sure we do so with consultation and thoughtfulness, allowing sufficient time to effect change.

BFA's SCOT Analysis: Top Threats

1. Challenges in the University Planning and Decision Making Processes

BFA teams serve the University to help understand and mitigate (operational, financial, etc.) risk. Yet many times the division is called on at the last hour, creating unnecessary cost and delays. By involving BFA early on in the planning of an initiative or project, we can help address issues promptly, which will remove obstacles and increase the probability of success. In addition, there can also be a lack of consistent support for policies and procedures designed for safety and compliance or program efficacy. This makes it difficult for BFA to provide an efficient, reasonably costed, and quality service.

2. Unprecedented Demands on State Appropriations and Limits on Tuition Increases

Like other divisions, BFA faces ongoing fiscal challenges, which make it difficult to provide the campus with needed support. It is never certain what state appropriations will be. Limits on tuition decreases our ability to cover increasing operating costs.

3. Federal, State and Local Government Regulations and Requirements, and Unfunded Mandates

Growing demands, without appropriate resource allocations, is a threat to the effectiveness of BFA's operations. This demand is exacerbated by the increased regulatory environment and unfunded mandates.

4. Increasing Number of Safety and Security Incidents and Concerns Across the Nation

The safety and security of students, faculty, and staff is of paramount importance. The growing number of safety and security incidents and concerns across the nation raises the need for more appropriate planning and messaging for a more secure campus.

5. Gaps in Compliance, Safety, and Risk Management

Western would be well served to adopt certain elements of an effective compliance program, although Higher Education is subject to many regulations at the federal and state levels. Recent reviews have identified gaps in compliance; a broader review is needed to identify other gaps and clarify responsibilities. Implementation of an ERM program is underway, but this will take time to reach an effective level of institution-wide risk management competency. Lastly, preventable incident, injuries, and property damage continue to occur.