VPFO STRATEGIC PLAN
2019-2021
Presentation for the VPFO Breakfast

PETER SMAILES, VICE-PRESIDENT, FINANCE & OPERATIONS
SEPTEMBER 6, 2019
VPFO STRATEGIC PLAN

Current State
• Current Organizational structure and future status
• Vision, Purpose, Values and Strategic Priorities

Pressures & Transitions
• SWOT Analysis
• Transitions and transformations
• Workforce efficacy

Progress status
• VPFO Strategic KPIs and Timelines
• Strategic Actions Status
• Attraction, recruitment, retention & succession

UBC Okanagan
Future State
• Next steps
QUESTIONS?

We will be using Slido to collect your questions during the meeting today.

Please enter your questions at any time during the presentation, and they will be answered at the end.

You may now take out your devices, go to slido.com and type in the event code #VPFO. Let’s answer a poll for a start!
CURRENT STATE
UBC VPFO PORTFOLIO

- AVP, Facilities
  - John Metras
  - Approx. 900
- Safety & Risk Services
  - TBD – ED
  - Approx. 150* w/ Security
- Comptroller
  - Karamjeet Heer
  - Approx. 40
- Treasurer
  - Yale Loh
  - Approx. 25
- ED, Financial Operations
  - Trish Pekeles
  - Approx. 120
- DIR, Human Resources
  - Karen Oyhenart
  - Approx. 12
- DIR, Communications
  - Chris Freek
  - Approx. 4

- Building Operations
- Infrastructure Development
- Energy and Water
- Occupational Research & Safety
- Environmental Protection
- Emergency Management
- Continuity Planning
- Insurance & Loss Prevention
- PrISM Risk Mgmt.
- Campus Security
- Financial Reporting
  - Endowment
  - Budget Office
- Business Officers
  - Faculty & Admin
- Cash
  - Financial planning & analysis
- Revenue Accounting
- Debt
  - Contracts
  - Housing
- Tax
- Financial Systems
- UBCO Client Services
- Strategic & Operational Performance

- Comptroller
  - Karamjeet Heer
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- UBCO AVP, Finance & OPS
  - Rob Einarson
  - Approx. 150

- Integrated Planning & Budgeting
- Campus Operations & Risk Management
- Campus Planning & Development
- Business Operations
- IRP
- IT Services

- • ED, Safety & Risk Services hire in progress for Sept 2019
  • Campus Security function moving to VPFO when ED, SRS starts
  • DIR, Strategic & Operational Performance: hiring in progress, timing likely Sept/Oct
VPFO’S VISION, PURPOSE, VALUES AND STRATEGIC PRIORITIES

VISION  We enable excellence in learning and research.

PURPOSE  We are trusted advisors, partners and professional service providers who continuously improve delivery of responsive and adaptive services and solutions to our stakeholders.

VALUES  We live UBC’s values of excellence, integrity, respect and accountability.

- Inspire Great People
- Deliver on Systems Renewal
- Provide Inspiring Spaces
- Lead Operational Excellence

- Accountable Leadership and Teamwork
- Innovative, Collaborative, Inclusive and Agile Change Agents
- Live and Breathe Safety and Service
We’re focused on 4 core areas aligned to UBC’s strategic plan

**Inspire Great People** (UBC Strategy #1)
Performance development commitment, succession planning, team member engagement and career resiliency, diversity & inclusion journey, safety-focused improvements.

**Deliver on Systems Renewal** (UBC Strategy #5)
IRP system(s) implementation and execution success, including critical process utilization over next 6 -12 months; sustainment plan execution is equally critical to ensure long term success.

**Provide Inspiring Spaces** (UBC strategy #2)
Advancing capital building priorities to Board 1, improvements in university spaces: Provincial engagement on seismic upgrades & improvements and improving the Facility Condition Index.

**Lead Operational Excellence** (UBC all strategies)
Procurement modernization, strategic sourcing, Uniforum efficiencies, forecasting efficacy, continuous practice and process improvement.
PRESSURES & TRANSITIONS
OUR GOOD, OUR BETTER, OUR WORRIES AND IMPACTS

**Strengthen**:  
- Team member commitment  
- Cross-university relationships  
- Service focused

**Weaknesses**:  
- Uncoordinated/resistance to change  
- Prioritization challenged (doing too much)  
- Risk averse

**Opportunities**:  
- Increase performance capacity and capability  
- Improve analytics for better decision making  
- Continue to improve service focus

**Threats**:  
- Recruitment and retention  
- Ever increasing demand for services  
- Moving too slowly impacts ability to deliver
VPFO TRANSITIONS AND TRANSFORMATIONS ARE A JOURNEY

Delivering on the VPFO vision and purpose requires effort on strategic and operational change at the same time.

**Strategic Programs**
- IRP cross functional efficacy
- Transformational focused behavior
- Committed resourcing

**Operational Objectives**
- Departmental transitions
- Operational excellence
- Measurable progress

We are here strategically with Workday and Planon

We are here strategically and operationally with SDM

We will get here strategically and operationally – consistently!
WORKFORCE EFFICACY: OUR PLAN

The right work and people to deliver our strategic and operational priorities

Assess accomplishments against plans
Adjust or change

Operational: Identify team member with budget implications.
Strategic: Align team members to long term work requirements.

Operational: Roles, skills and capabilities; critical roles captured
Strategic: Roles and skills required for the next 2-3 years

Operational: What work will we focus on in next 6-18 months?
Strategic: What work will we focus on in next 2-3 years?

Operational: Identify gap from current skills with operational plan requirements.
Strategic: Identify gap from current skills with strategic plans, including succession plans.
# STRATEGIC KPI’S - TIMELINES

Focused discipline of our people, technology, work practices and processes

<table>
<thead>
<tr>
<th>Inspire Great People</th>
<th>Next 6 months</th>
<th>Next 12 months</th>
<th>By end of 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Improved performance, stakeholder satisfaction and career resiliency</td>
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<tr>
<td>• Enhanced safety culture</td>
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<tr>
<td>• Diversity and inclusion enable innovation, collaboration and agility</td>
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<tr>
<th>Deliver on Systems Renewal</th>
<th>Next 6 months</th>
<th>Next 12 months</th>
<th>By end of 2021</th>
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<tbody>
<tr>
<td>• IRP (Workday, Planon, AEP) go live successful April 1 2020</td>
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<td>• Sustainment organization operational April 1 2020</td>
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| • Standardized process utilization day 1 through sustainment |

<table>
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<th>Provide Inspiring Spaces</th>
<th>Next 6 months</th>
<th>Next 12 months</th>
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<tr>
<td>• Academic Building Capital priorities advanced to Board 1</td>
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<td>• Seismic upgrades initiated and completed – working with the Province on a larger solution</td>
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<tr>
<td>• Maintaining and improving Facilities Condition Index</td>
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<th>Lead Operational Excellence</th>
<th>Next 6 months</th>
<th>Next 12 months</th>
<th>By end of 2021</th>
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<tr>
<td>• Procurement modernization, strategic sourcing, Uniforum efficiency in AR and budget forecasting</td>
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| • Purposeful redeployment of savings through continuous improvement in practices and processes. |
## VPFO STRATEGIC ACTIONS STATUS

<table>
<thead>
<tr>
<th>Key Actions</th>
<th>Critical dates</th>
<th>Status</th>
<th>Risks and Mitigations</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRP/AEP/Planon Implementation</td>
<td>April 1, 2020</td>
<td>In progress</td>
<td>Significant resources from the VPFO portfolio committed to a successful program go-live. Portfolio change management is underway.</td>
</tr>
<tr>
<td>IRP change management and key messaging</td>
<td>Past due</td>
<td></td>
<td>The VPFO portfolio is fully engaging with the IRP change management team but the delayed start has put added pressure on the portfolio.</td>
</tr>
<tr>
<td>Implement Service Delivery Model for faculties/departments for procurement modernization, develop tracking/reporting for savings</td>
<td>April 1, 2020</td>
<td>In progress</td>
<td>Learnings from faculties and departments that are now fully onboard are being applied going forward.</td>
</tr>
<tr>
<td>Workforce planning including succession planning</td>
<td>Started</td>
<td></td>
<td>Identify the roles that have biggest change impacts; plans to be identified and implemented as more is understood about the future state; improve career resiliency. Critical roles have emergency succession plans</td>
</tr>
<tr>
<td>Build an institutional resilience culture for UBCV and UBCO, including emergency response, continuity planning, and crisis management</td>
<td>In progress and on going</td>
<td></td>
<td>New ED, Safety and Risk Services hire in progress to close development of the strategic plan; Campus Security moving over will create more synergies in plans for safety.</td>
</tr>
<tr>
<td>Strengthen the safety culture for all UBC activities, enhancing the student, faculty and staff experience, and reduce workplace injuries</td>
<td>In progress and on going</td>
<td></td>
<td>Reduction in physical safety incidents; plans to be worked in conjunction with UBC programs and support (Chief Audit and Risk Officer, HR Health and Wellness and Change transition teams).</td>
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NEXT STEPS TO SEPTEMBER 2020 UBCO

• Continue to support IRP implementation and integration into UBCO operations and sustainment
• Develop finance and operations strategies to support UBCO’s 2040 Vision Strategy
• Continued development of intermediate and long term capital strategy to address space shortages
• Support cross campus alignment in integration of Procurement Modernization and Strategic Sourcing
• Review and evolve Academic Unit budget models to support 2040 Vision goals
• Support cross campus Alignment and Integration Project for IT services
• Complete onboarding of in-house food services and completion of two residences
• Evolution of UBCO Project Services/Construction Management office as well as an improved framework for building optimization
FUTURE STATE
NEXT STEPS TO SEPTEMBER 2020

- Continue with an absolute focus on IRP, AEP and the Sustainment Model
- Continue with implementation of Procurement Modernization and Strategic Sourcing
- Undertake workforce planning to support successful implementation of IRP, longer term efficiencies, and career resiliency
- Integrate Campus Security and Risk Management Services into Safety and Risk Services
- Build Operational Excellence capacity to be fully ready once IRP is implemented

Focus on the VPFO Strategic Priorities:
- Inspire Great People, Deliver on System Renewal, Provide Inspiring Spaces, Lead Operation Excellence