

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.

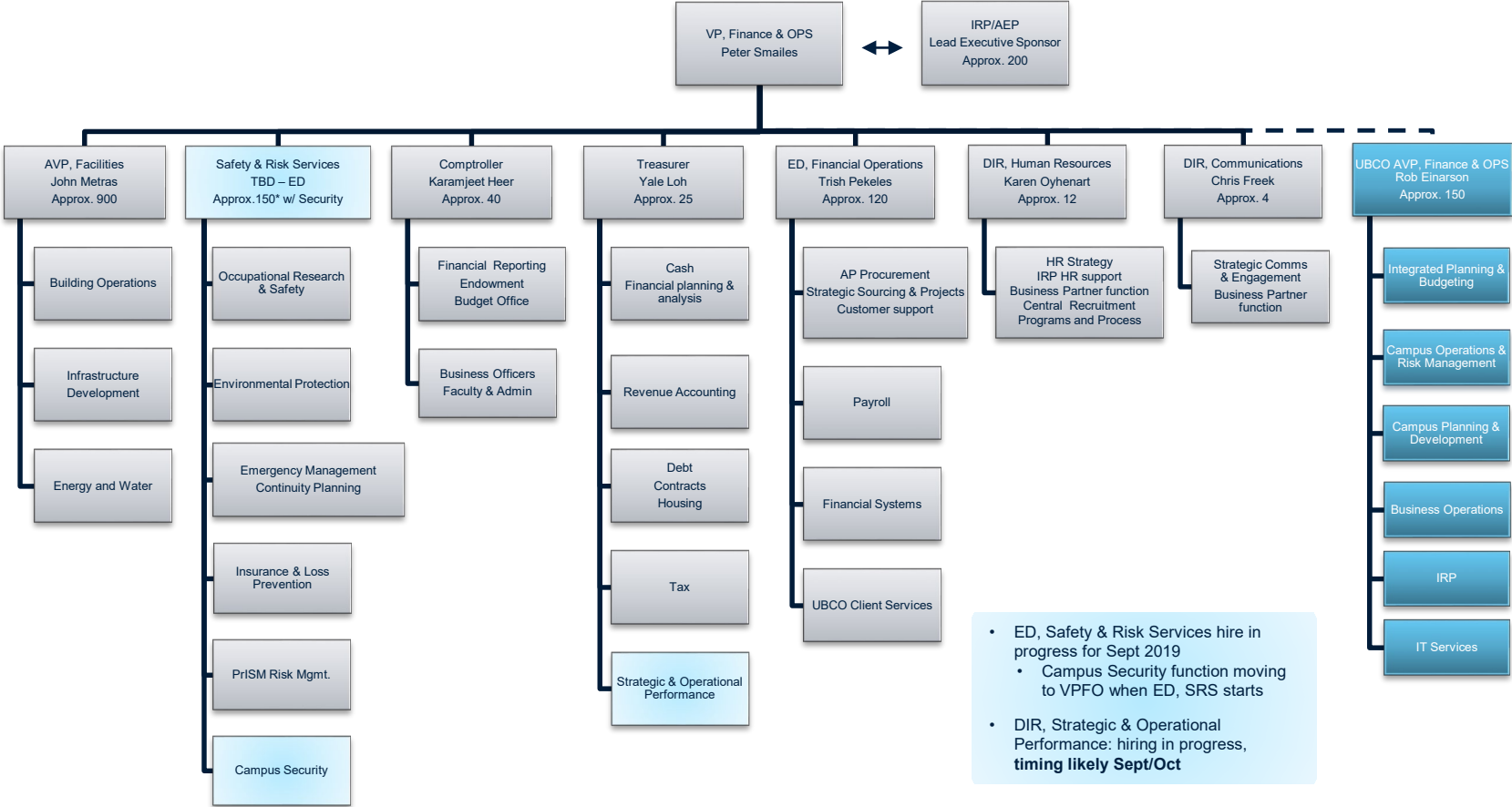
*You may now take out your devices, go to **slido.com** and type in the event code **#VPFO**.
Let's answer a poll for a start!*



CURRENT STATE



UBC VPFO PORTFOLIO



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

VPFO'S STRATEGIC PRIORITIES FOR THE NEXT 3 YEARS

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, Uniform efficiencies, forecasting efficacy, continuous practice and process improvement.



PRESSURES & TRANSITIONS



OUR GOOD, OUR BETTER, OUR WORRIES AND IMPACTS

- Team member commitment
- Cross-university relationships
- Service focused

Strengths

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

Weaknesses

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

Opportunities

- Recruitment and retention
- Ever increasing demand for services
- Moving too slowly impacts ability to deliver

Threats



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



WORKFORCE EFFICACY: OUR PLAN

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



Assess accomplishments against plans
Adjust or change

Execute on **change** and **communication** plans with risk mitigations and dependencies aligned.

Operational: Identify team member with budget implications.

Strategic: Align team members to long term work requirements.



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: Roles, skills and capabilities; critical roles captured

Strategic: Roles and skills required for the 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.

PROGRESS STATUS



STRATEGIC KPI'S - TIMELINES

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



| | Next 6 months | Next 12 months | By end of 2021 |
|------------------------------------|---|---|--|
| Inspire Great People | <ul style="list-style-type: none"> Improved performance, stakeholder satisfaction and career resiliency Enhanced safety culture Diversity and inclusion enable innovation, collaboration and agility | | |
| Deliver on Systems Renewal | <ul style="list-style-type: none"> IRP (Workday, Planon, AEP) go live successful April 1 2020 Sustainment organization operational April 1 2020 | | <ul style="list-style-type: none"> Standardized process utilization day 1 through sustainment |
| Provide Inspiring Spaces | <ul style="list-style-type: none"> Academic Building Capital priorities advanced to Board 1 Seismic upgrades initiated and completed – working with the Province on a larger solution Maintaining and improving Facilities Condition Index | | |
| Lead Operational Excellence | <ul style="list-style-type: none"> Procurement modernization, strategic sourcing, Uniform efficiency in AR and budget forecasting | | |
| | | <ul style="list-style-type: none"> Purposeful redeployment of savings through continuous improvement in practices and processes. | |



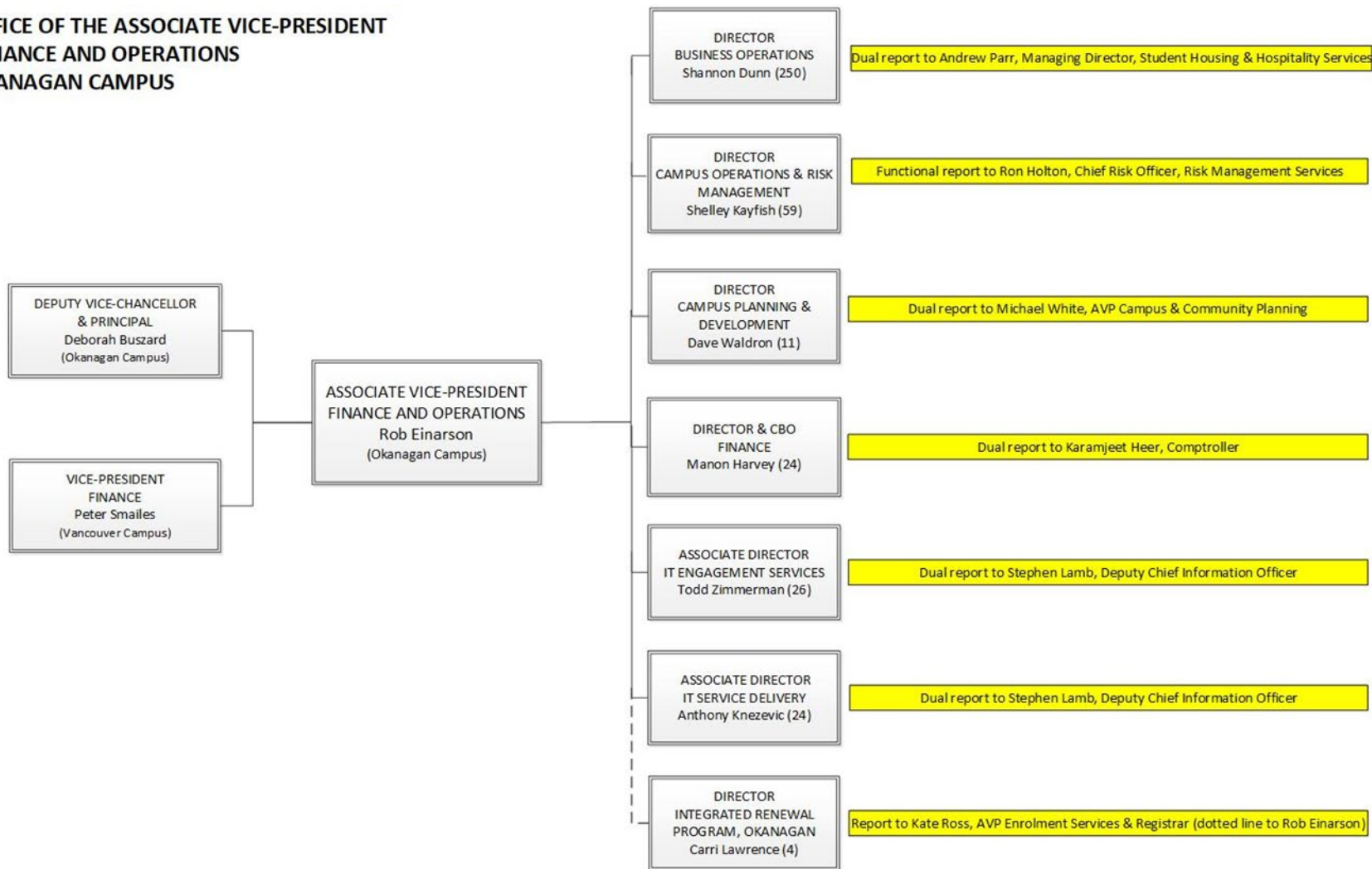
VPFO STRATEGIC ACTIONS STATUS

| Key Actions | Critical dates | Status | Risks and Mitigations |
|--|------------------------------|--------|---|
| IRP/AEP/Planon Implementation | April 1, 2020 In progress | | Significant resources from the VPFO portfolio committed to a successful program go-live. Portfolio change management is underway. |
| IRP change management and key messaging | Past due | | The VPFO portfolio is fully engaging with the IRP change management team but the delayed start has put added pressure on the portfolio. |
| Implement Service Delivery Model for faculties/departments for procurement modernization, develop tracking /reporting for savings | April 1, 2020 In progress | | Learnings from faculties and departments that are now fully onboard are being applied going forward. |
| Workforce planning including succession planning | Started | | 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 |
| Build an institutional resilience culture for UBCV and UBCO, including emergency response, continuity planning, and crisis management | In progress and on going | | 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. |
| Strengthen the safety culture for all UBC activities, enhancing the student, faculty and staff experience, and reduce workplace injuries | In progress and on going | | 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). |

UBC OKANAGAN



**OFFICE OF THE ASSOCIATE VICE-PRESIDENT
FINANCE AND OPERATIONS
OKANAGAN CAMPUS**





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



THE UNIVERSITY OF BRITISH COLUMBIA