VPFO Strategic Plan
2019-21
Leaders’ Toolkit V1.0
September 6, 2019
INSTRUCTIONS – PLEASE READ

This document is used to support leaders in sharing important information with team members, and creating an environment that encourages two-way communication. Remember it’s okay for you to ask questions as well.

USING THIS TOOLKIT

☐ Communicating important information is a crucial part of your role. We need you to share information about the launch of the VPFO Strategic Plan.

☐ Use the information below to support conversations with team members—in person, where possible.

☐ Learn the messages and use your own language and local context to create two-way conversations with team members.

☐ Allow time for questions. It’s okay if you can’t answer—collect feedback and email it to vp.finops@ubc.ca whenever necessary.

In this toolkit you’ll find:

- Key dates
- Key Messages
- Q&A’s for leaders
- Q&A’s for team members

CHECKLIST

☐ Read this toolkit and become familiar with the information. Get to know the VPFO strategic priorities and the key messages in your own words.

☐ Know, in your own words, how the VPFO Strategic Plan connects to your department’s plans and the UBC Strategic Plan, so your team members can find their place.

☐ Make a plan to share this information with your team members. Do you need to set up a meeting with your team to answer questions and provide an overview of what’s changing? Are there individuals you should speak with separately?

☐ Ensure that your team is aware of how this will be happening and any significant upcoming events.
OUR INTENTION: We know that a strategic plan can only be successful when people see themselves within that plan. Our intention for communicating the VPFO Strategic Plan is to have all people at all levels in the VPFO understand that they are part of the portfolio, and that their efforts drive our strategic priorities to: Inspire Great People, Deliver on Systems Renewal, Provide Inspiring Spaces, and Lead Operational Excellence. We are launching a content strategy in tandem with the plan to help tell this story.

Background

With the delivery of the UBC Strategic Plan (Shaping UBC’s Next Century) in 2018, and the completion of the VPFO’s leadership transition, the VPFO portfolio has reviewed its strategies and set renewed strategic priorities for the next three years (2019 – 2021).

The final version of the VPFO Strategic Plan 2019 – 21 was completed in August 2019. The plan is now ready to be communicated so that you and your team members can see themselves, and their role/place in the VPFO and UBC, as connected to our collective strategic priorities.

How we’re Communicating the VPFO Strategic Plan

A strategic plan is, by its nature, big-picture and abstract. We know from research with our own team members and in other organizations that for people to find themselves in a strategic plan, they prefer that we are straight-forward and concrete as possible when communicating about it.

We also know that when communicating something abstract to a large group, it will take many different people sharing the information in many different ways, over the life of the plan for the plan to be successful.

VPFO Communications & Engagement will be developing a campaign that will create the large-scale framework for regular communications of the strategic plan and its progress. To be successful, leaders, and administrators across the VPFO will need to independently work to build understanding of the plan itself and our strategies to communicate and share tools. You will be accountable for leading and sharing with your team members, through both your regular face-to-face meetings and work and through participating in special events throughout the year.
<table>
<thead>
<tr>
<th>DATE</th>
<th>ITEM</th>
<th>ACTION</th>
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<tbody>
<tr>
<td>September 6, 2019</td>
<td>VPFO Leadership Meeting</td>
<td>• Strategic Plan presented to portfolio leadership by VPFO Executive&lt;br&gt;• Leadership team provided with initial toolkit enabling them to share message with teams</td>
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<tr>
<td>September 24, 2019</td>
<td>Special edition of VPFO News for all portfolio team members</td>
<td>• Newsletter edition focusing on Strategic Plan containing additional material</td>
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<tr>
<td>Ongoing</td>
<td>Strategic Plan material</td>
<td>• All existing collateral and tools will be updated to align to the new VPFO narrative frame&lt;br&gt;• New policies, guidelines and tools will be created by VPFO Communications &amp; Engagement for you to communicate on the portfolio’s behalf&lt;br&gt;• Watch for more material about the Strategic Plan to be shared over the course of 2019/2020 and beyond, across a number of channels</td>
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<tr>
<td>Quarterly until end of 2020</td>
<td>VPFO Stories</td>
<td>• Communications &amp; Engagement will be developing stories of VPFO team members working towards a common goal. The stories will demonstrate the strategic pillars of the plan in real, concrete examples that bring our KPIs to life.&lt;br&gt;• These long form stories will live on a special section of the VPFO website. Shorter department-focussed stories will be pulled from the long-form story to cross publish to departmental websites, digital signage, local newsletters, etc.</td>
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Key Messages

The VPFO is a unified team

While we have many different roles, we’re all part of one team who work together to facilitate and deliver operational excellence at the university. UBC would not be able to succeed in its teaching and learning mission without us.

- The constituent units of the VPFO are one unified team.
- These units work together to facilitate and deliver operational excellence at the university.
- The VPFO is fundamental to UBC’s teaching and learning mission.

Each member of the VPFO contributes to the overall success of UBC

We strive to have the right skills at every level of the VPFO, we pull together to provide a platform for university operations, enabling excellence in learning and research at UBC.

- The members of the VPFO are trusted advisors, partners, and professional service providers who provide a critical foundation for university operations.
- Through our workforce planning activity, we will understand the skills in our workforce better, enabling career resiliency, operational efficiency and create opportunities for our people to grow.
- The work done by the VPFO enables excellence in learning and research.

The VPFO has a Strategic Plan

The direction of every unit within the VPFO is determined by our Strategic Plan, which is aligned with UBC’s Strategic Plan. When we achieve what we plan to do, we will improve both the VPFO and the university.

- The work done by the VPFO’s units is aligned to the strategic priorities laid out in our Strategic Plan.
- These priorities, in turn, are aligned with UBC’s Strategic Plan.
- When we accomplish the KPIs (measures of success) in our Strategic Plan, we improve both the VPFO and the university.
Questions You Might Have:

1. Will the Strategic Plan impact my team’s workload?

   Being strategic is not about doing as much as possible, it's about selecting the tasks that will contribute most towards our objectives, and completing them as a priority. Taking a strategic focus on the work carried out across the VPFO ensures the work we all do is the right work; it is not wasted, and helps us achieve our collective goals as efficiently as possible.

2. I’m anticipating some issues that may not have been considered or have questions/concerns about the Strategic Plan, who can I speak to about them?

   The senior leader within your area of the VPFO will be the best person to voice your concerns to or answer any specific questions you may have.

3. I already have a plan for my team, how will it be impacted?

   All plans for work within the VPFO, whether at a team, unit, or departmental level should align to the Strategic Plan. If you do not think your team’s work aligns to the VPFO Strategic Plan, speak to your direct leader, as it’s important to understand your individual impact, and that of your team, on our goals. You can view the Key Performance Indicators we’ll be measuring our success against within the Strategic Plan.

4. How is this different from the UBC Strategic Plan?

   The VPFO Strategic Plan aligns to the UBC Strategic Plan, but focuses on specific elements that relate directly to our portfolio. The VPFO plan shares the same values as the overarching UBC plan and contributes towards the university’s objectives.

5. Who is responsible for informing VPFO team members about the plan?

   In short, you are, but we’re here to help. You’ll see communications material about the Strategic Plan over the coming weeks and months, and direct leaders within the VPFO will be the primary source of information for our front line people. We need you to share the information in this document, along with future material with your team members and ensure they understand it.

6. I’ve been asked a question that I’m not sure how to answer, what should I do?

   If you’re not sure how to answer a question about the Strategic Plan, send it to vp.finops@ubc.ca and we’ll get back to you as soon as possible.

7. I’m in the VPFO in the Okanagan, how will this affect me?

   The VPFO strategic Plan will be aligned with the UBCO 2040 Vision, and the four pillars will be consistent across both. More information will be shared on this in due course.
Questions You May be Asked:

1. Why do we need a Strategic Plan?
   The VPFO Strategic Plan determines the direction of the VPFO for the next three years, and lays out our strategic objectives for this period. It is essential to have clarity on our plans, and how they align with UBC’s overarching plan in order to achieve operational excellence.

2. Why does this matter to me?
   The VPFO Strategic Plan is our north star and will guide every person, team, unit, and department. It affects everyone within the VPFO as their daily activities will be oriented by the Strategic Plan and its KPIs (measures of success).

3. Why is this happening now?
   The VPFO Strategic Plan has been in development for a number of months, following the delivery of UBC’s Strategic Plan (Shaping UBC’s Next Century). With our new leadership team in place, we are ready to move forward together.

4. How will I be impacted by the Strategic Plan?
   The VPFO Strategic Plan guides everyone within the VPFO as it determines a clearer operational direction for every person, team, unit, and department within it. The various activities within the plan will impact each team differently, for more information about how your team will be impacted, speak to your direct leader or visit https://vpfo.ubc.ca/strategy.

5. Where can I find more information about our Strategic Plan?
   You can find out more general information about the strategic plan by visiting https://vpfo.ubc.ca/strategy or by speaking to your direct leader for more detailed questions about your work.

6. Am I part of the VPFO/where do I fit into the VPFO?
   You are part of the VPFO. You can find more information about the structure of our portfolio by visiting https://vpfo.ubc.ca/about or by speaking to your supervisor.

7. When will the Strategic Plan take effect?
   Work towards some of the objectives within the VPFO Strategic Plan has already begun. Delivering the plan is a priority for the portfolio, so expect progress on all aspects of the plan to happen soon and be ongoing. For more information about the VPFO Strategic Plan, and specifically timelines affecting it visit https://vpfo.ubc.ca/strategy.
Attachments
Additional Resources

We will continue to develop resources as the Strategic Plan rolls out, but the following items are now available to use as tools as you begin socializing the Strategic Plan with your teams.

Website:

Content relating to the Strategic Plan is in development, but the core information relating to the plan is now available on the VPFO website here: https://vpfo.ubc.ca/strategy. This content will continue to be developed in the coming months, and will be supplemented by the content strategy outlined in our communications plan.

Content Strategy - Examples

The Communications and Engagement team will be preparing a story series that highlights the connections between our VPFO departments, and how their work impacts the greater UBC mission and vision.

These stories will focus on team members and be told in long-form on the VPFO website, with shorter versions that relate to each departmental area also published on respective departmental websites. The connections between these individuals, their work, and the university will also be illustrated with a distinct visual approach. Some examples can be found below:
THE VPFO AND YOU: ENABLING A BETTER UBC

John Builder, Project Manager, Infrastructure Development
Designing a clean room for cutting-edge plasma research.

Phil Smartman, Researcher, Faculty of Applied Science
Building a lab to develop medical technology for space travel.

Read more at vpfo.ubc.ca/better

The University of British Columbia
VP Finance & Operations

The VPFO and you: enabling a better UBC

Alan Peng, Curator, UBC Museum of Anthropology
Designing custom supports to preserve artifacts at UBC’s Museum of Anthropology.

Sally Totem, Procurement Officer, Financial Operations
Sourcing innovative storage solutions to keep MOA’s totem poles safe during restoration.

Sukh Bains, Treasury Officer, UBC Treasury
Managing our internal bank portfolio to help campus renewal and expansion.

Read more at vpfo.ubc.ca/better

The University of British Columbia
VP Finance & Operations