

2024-27

# VPFO Strategic Plan

## Lens

We are on a collective journey to transform the VPFO from conventional, traditional practices to develop a cross-portfolio brand promise as trusted business partners. We will work closely with our customers to guide, advise and ensure the right fundamental services are in place to support UBC.

## Vision

We are **global leaders** of exemplary services and outstanding customer experience

## Purpose

Enabling **excellence** at UBC

## Values

### Innovation — I am agile

I challenge us to be curious and move courageously

### Unity — I am collaborative

I engage the collective efforts of the VPFO team to build a better UBC

### Accountability — I am a steward

I lead myself and others to care and be responsible for our university

## Strategic Directions

### 1. Innovation

#### Business Transformation

Enhance our safety, sustainability and financial accountability

#### Goal 1.1

Lead Finance transformation, maturity and accountability

1. Reimagine both our budget and funding strategies
2. Advance finance and accounting practices and their supports
3. Improve stewardship through data management, Key Performance Indicators (KPIs), reporting, and forecasting capability and strategy
4. Renew and align capital planning with UBC's strategic vision, sustainability goals, and campus development priorities

#### Goal 1.2

Achieve excellence in campus environment, safety and sustainability

1. Conduct a thorough assessment of campus environment, appearance, and functionality to identify areas for improvement
2. Identify, review and benchmark critical safety and security measures, then develop and deliver on enhanced strategies
3. Develop and implement sustainability initiatives for waste reduction, energy efficiency, and sustainable transportation

### 2. Collaboration

#### Customer Service & Engagement

Advance our culture of service, stewardship & continuous improvement

#### Goal 2.1

Enable cross-portfolio planning

1. Enhance cross-portfolio clarity and collaboration through improved planning processes
2. Foster project management competency and maturity across divisions
3. Reimagine our approach to cross-portfolio work intake to improve shared accountability and increase efficiency

#### Goal 2.2

Clarify our customers, services and service levels

1. Establish a comprehensive engagement strategy with the necessary resources and tools to better understand and address customer needs
2. Develop a robust customer experience strategy, including systems and processes, to enhance service delivery
3. Transform our digital systems and channels into a cohesive and streamlined set of tools to facilitate university operations
4. Partner internally and externally to share expertise and effectively manage service expectations

### 3. Inclusion

#### Cultural Transformation

Inspire, recruit, develop, and support people through a unified VPFO culture

#### Goal 3.1

Support our people

1. Develop a unified, efficient, and engaging recruitment and onboarding process
2. Enhance leadership through a comprehensive learning and development program
3. Build communities of practice to advance both our people and collaborative processes

#### Goal 3.2

Inspire our people through VPFO cultural norms and values

1. Promote VPFO values through targeted, people-focused initiatives
2. Foster trust and loyalty through the VPFO culture, values and brand promise
3. Strengthen connections and create opportunities between the Okanagan and Vancouver campuses

