

The University of Georgia
Finance and Administration

Strategic Plan
2011 - 2021

Revised September 2017

STRATEGIC PLAN, 2011-2021

Finance and Administration

The University of Georgia

Introduction

Finance and Administration consists of a staff of more than 1,700 people who provide the essential fiscal and administrative support required by the University of Georgia to achieve its ambitious goals in teaching, research and service. Seven divisions are housed under Finance and Administration: Auxiliary Services, Budget, Environmental Safety, Facilities Management, Human Resources, University Architects for Facilities Planning, and University Business and Accounting Services, as well as University Police and the institution's Office of Emergency Preparedness. In addition, the Vice President serves as chair of the UGA Real Estate Foundation, an entity under the auspices of the UGA Research Foundation, and Treasurer of both the UGA Research Foundation and the UGA Athletic Association. The Offices of Real Estate and Space Management and three Assistants to the Vice President also report directly to the Vice President.

In Summer 2011—in response to the recent development of the University of Georgia's Strategic Plan for 2020, which will guide the institution's actions over the next decade—the leaders of Finance and Administration re-examined their own strategic plan for the division. In a very deliberate process, the leadership team considered not only the goals of the University's new plan but also the potential impact of many factors on higher education (as well as specific to the University of Georgia). These factors included, among others: decreasing state support; increased demands for accountability; higher expectations from students, who are now paying a larger portion of the cost of their education; growing privatization of research; mounting deferred maintenance issues on the state's most historic campus; and hiring, retention, compression and morale issues compounded by the inability to provide state-funded merit increases in salary for faculty and staff for the last three years.

As part of this self-examination, the leaders also discussed their own goals for Finance and Administration—i.e., where they envisioned the division in five to ten years. The end result of this focused discussion was the development of a new Strategic Plan for Finance and Administration, 2011 – 2021. In December 2016, the strategic plan was re-examined in a collaborative process including graduates of the Finance and Administration Leadership Institute and leadership from the F&A Staff Representative Group. While the plan in its entirety remains intact, several additions were made to continually enhance the services and support provided by the division and further elevate the University's academic and student life missions. This document, which will serve as a guiding roadmap for the division over the next decade, supports the University's overarching goals in its continuing pursuit of excellence. It also streamlines the statement of Finance and Administration's mission and core values.

The key message for Finance and Administration is that its driving mission can be summed up in two words: Stewardship & Service. Finance and Administration strives to become a trusted advisor to the rest of the University of Georgia, as well as the entire

University System of Georgia, by being engaged as an expert participant in strategic decisions early in the process in order to add value to deliberations.

Mission Statement

Stewardship and Service:

Finance and Administration exists to provide exceptional service and stewardship of the University of Georgia's financial, human and physical resources.

Core Values

Integrity—Personal and Professional

The members of the Finance and Administration team are committed to maintaining the highest degree of ethical and legal standards. We emphasize honesty, reliability, cooperation, collaboration, open communication and participative decision-making. We are committed to productive and conscientious performance of our responsibilities.

Teamwork Through Mutual Respect and Fairness

Finance and Administration's greatest strength is its people, and we realize that our team is strengthened through the diversity of the members who comprise it. We accept, encourage and value the inherent differences of individuals and treat everyone with fairness and respect. We extend this same treatment to all colleagues inside and outside the University and strive to create partnerships with our colleagues that will strengthen the entire University team.

Excellence in Service and Innovation

The members of the Finance and Administration team provide superior quality service. We constantly seek opportunities to enhance services and processes through a commitment to innovation and continuous improvement in order to exceed customer expectations and make the best use of University resources. We understand that creating an environment of excellence in service and innovation requires a commitment to the ongoing professional development of all Finance and Administration staff.

Student-Centric Approach

While many of the functions of Finance and Administration may not be directly connected with the student experience, the division will focus on how all team members can positively impact the overall student experience. We are committed to providing services, support and resources that enhance the overall student experience and will make this focus a part of each and every decision we make.

Demonstrating these characteristics throughout their personal and professional activities, the Finance and Administration team represents the best of what makes the University of Georgia a superior higher education institution.

Strategic Goals

Goal #1: Partner with our campus colleagues to become a trusted advisor, actively engaged in the process of planning and implementing the level of comprehensive support required to enable the University of Georgia to achieve its strategic goals and objectives. This effort encompasses financial and administrative support, as well as safety, security and customer service.

(This objective complements the entire UGA Strategic Plan, but especially UGA Strategic Direction I – Building on Excellence in Undergraduate Education and UGA Strategic Direction II – Enhancing Graduate and Professional Programs.)

Action Steps:

- Finance and Administration must seize the opportunity to participate at an even greater level on vital University-wide committees. Doing so ensures a strong connection between academics and fiscal/administrative professionals and provides a foundation for informed decision-making. Through engaged participation, Finance and Administration units will be proactive rather than reactive in their approach, offering to assist units across campus in problem-solving.
- Finance and Administration should strive to facilitate, not merely regulate, and to be actively engaged in solving problems, not making them more complex.
- Finance and Administration must always strive to protect University people and property by setting the standard for service and stewardship of University resources.
- Finance and Administration must always recognize that it will ultimately be judged by its ability to solve problems and by the level of service it delivers to the University community, and in particular, its faculty, staff and students.

Goal #2: Strive for prudent management of financial resources and set the standard for a culture of compliance and accountability, ensuring efficiency and strong stewardship of financial resources at the University of Georgia.

(This complements all of UGA's Strategic Directions, but most specifically UGA Strategic Direction VII, which states in its narrative section that the University "should strive for managing financial resources efficiently.")

Action Steps:

- Be proactive in engaging with the Board of Regents staff in a meaningful way as a constructive partner to help devise solutions to complex challenges, such as revision of the University System funding formula or capital outlay process.
- Continue to improve relations that UGA has enjoyed with the Regents Office of Fiscal Affairs, the Governor's Office of Planning and Budget and the Legislative Budget Office.

- Develop longer-range budget forecasts in order for the University's senior administration to more fully comprehend the level of resources that are and will be available to implement as well as to sustain strategic priorities.
- Continue to collaborate with colleagues in Academic Affairs to provide the senior administration with appropriate outcomes-based criteria on which to base resource allocation decisions.
- Be innovative in developing various strategies to underwrite UGA's tripartite mission, while dealing with the volatile economic climate.
- Explore and develop solutions to current and future challenges through greater utilization of information from external subject matter experts and through being more fully engaged in partnerships with other institutions and professional organizations.
- Continue to work with campus constituents to differentiate the costs of operating UGA—a Carnegie I Research Institution—from those of other institutions and effectively articulate this to state leaders and private partners to justify a greater level of financial support from them.
- Support the senior administration by providing them with data to address emerging issues, such as a wave of pending retirements affecting research grants or salary compression issues.

Goal #3: Provide the level of financial and administrative support, as well as safety and security, required to efficiently and effectively support UGA's growing research enterprise and economic development initiatives.

(This objective complements UGA Strategic Direction III – Investing in Proven and Emerging Areas of Research Excellence.)

Action Steps:

- Develop simple, flexible policies and procedures while maintaining sound business practices.
- Be proactively engaged in the development of a master plan for the University's new administrative information systems. This plan should address how data is to be stored and accessed, as well as define the University's authoritative data set.
- Provide data and support to the Provost and the Vice President for Research to encourage a culture change at the University by providing incentives for faculty to charge more of their time, effort and salary to externally funded contracts and grants. This would foster a more entrepreneurial approach to the development of research initiatives and improve the University's ability to compete for research funding.
- Ensure that facilities are renovated to satisfy the programmatic requirements of the College of Public Health and AU/UGA Medical Partnership at the UGA Health Sciences Campus and that all auxiliary support needs (e.g., security, transportation, food services, parking, etc.) are adequately met.
- Support the expansion of UGA's engineering and other STEM programs by providing appropriate facilities, infrastructure and ongoing support to meet any specific programmatic requirements.

- Serving in the capacity of a trusted advisor, participate as an active, early member of any University-wide team pursuing major economic development initiatives.
- Maintain compliance with national health and safety standards.
- Involve unit representatives in any discussion of central services that are being considered for distribution. Such engagement can prevent cost-shifting instead of actual cost-saving and can ensure that the training needs of the units to assume additional responsibilities are understood and addressed.
- Provide appropriate financial and administrative support beyond the Athens campus to the University's other campuses and more remote locations, as well as to the University System of Georgia and Georgia's communities.

Goal #4: Provide the expertise and programs required to support the University's strategic direction to recruit, retain and develop the best faculty members and extend those efforts in support of the staff as well.

(This complements UGA Strategic Direction V – Improving Faculty Recruitment, Retention and Development.)

Action Steps:

- Recruit, retain and support advancement opportunities for a more diverse faculty and staff.
- Acting in a trusted advisor role, provide the senior administration with long-term forecasts of retirements, emphasizing: 1) on the academic side, their impact on faculty productivity and research funding; and 2) on the administrative/staff side, their impact on institutional memory and leadership.
- Engage with senior administrators centrally as well as in academics, research, and public service and outreach to develop succession plans.
- Offer training programs to enable staff members to enhance their skills and perform at ever-increasing levels as administrative systems and responsibilities evolve.
- Explore methods of revamping the University's compensation plan in preparation for future action to combat salary compression.
- Strive to support and enhance employee morale during a time when budget reductions have negatively affected staffing levels and the ability to offer monetary rewards for performance.
- Advise senior administrators on programs to enable faculty and staff to feel more engaged in the mission of the institution.
- Develop guiding principles for the management, development and compensation of all University staff that includes:
 - Staff development through consistent recruitment and retention efforts, leadership training and mentoring.
 - Development of a compensation strategy that allows for and encourages ongoing professional development, career advancement and consistent implementation.
 - Develop a succession plan to recruit and retain the workforce of the future

in preparation for a large number of anticipated retirements.

Goal #5: Improve and maintain facilities and infrastructure in order to provide excellence in instruction, research and service.

(This complements UGA Strategic Direction VI – Improving and Maintaining Facilities and Infrastructure to Provide Excellence in Instruction, Research and Service.)

Action Steps:

- Ensure that the Physical Master Plan continually adapts to the University's changing academic needs and that it works in conjunction with the University's Strategic Plan to inform all discussions about campus growth.
- Engage as a trusted advisor with academic units early in the process to plan for new programmatic needs and provide the level of service required to meet them.
- Begin implementation of a long-range Capital and Renewal Plan for UGA's energy systems.
- Strive to increase the amount of Major Repair and Renovation (MRR) funds provided to the University and continue to be good stewards of those funds, ensuring that they are directed toward the University's most pressing needs.
- Continue to investigate creative solutions to alleviate the campus space crunch, focusing on infill opportunities that create a more walkable campus.
- Complete a space utilization study for the Athens campus and a programming study for enrollment growth and facility use at the extended campuses.
- Partner with academic, administrative and student life units to improve the utilization of space on campus and effectively analyze data on repetitive issues with facilities.

Goal #6: Enhance UGA's commitment to sustainability, operating as a good and responsible steward of UGA's natural resources.

(This complements UGA Strategic Direction VII – Improving Stewardship of Natural Resources and Advancing Campus Sustainability.)

Action Steps:

- Continue to implement recommendations of the Working Group on Sustainability, as endorsed by President Adams in 2009, to expand and heighten awareness of UGA's efforts in sustainability.
- Complete the Greenhouse Gas (GHG) Emissions Inventory and develop a comprehensive plan for reduction.
- Continue progress toward the goals of the Governor's Water Challenge and Governor's Energy Challenge as part of the Conserve Georgia program.
- Evaluate current purchasing practices and develop guidelines and standards for environmentally-preferred purchasing by all campus departments.

- Continue to improve recycling efforts and divert an even greater amount of trash from landfills.
- Encourage the use of alternative modes of transportation by University students, faculty and staff.
- Update UGA Guidelines for Design and Construction to incorporate current sustainable design standards.

Goal #7: Assist the University of Georgia in serving the citizens of Georgia and beyond through increased engagement with the community.

(This objective complements UGA Strategic Direction IV – Serving the Citizens of Georgia and Beyond.)

Action Steps:

- Provide support and necessary services at extended campuses so that the UGA experience is equivalent for students, staff and faculty at these locations.
- Strengthen alliances and cooperative agreements that will enhance the relationship and service capabilities of UGA to the local community and the State of Georgia.
- Increase utilization of minority and small business vendors, particularly those in the local area.
- Educate the University and Athens area community about the daily operations of units within Finance and Administration as well as achievements of the University as a whole.
- Coordinate a successful Campaign for Charities to benefit social service agencies, most of which provide assistance in local or state settings.
- Promote and encourage employee volunteerism through the variety of community agencies.

Goal #8: Provide services and support that positively impact and enhance the experience of the University of Georgia students by actively engaging the student body for input about their unique needs.

(This complements UGA Strategic Direction I – Building on Excellence in Undergraduate Education and UGA Strategic Direction II - Enhancing Graduate and Professional Programs.)

Action Steps:

- Continually seek to improve student services and analyze efficiencies in order to deliver services within the Finance & Administration units, which are cost effective and emphasize student affordability.
- Establish advisory boards for student services provided by Finance & Administration to more fully engage with students on an ongoing basis.
- Create campus and community partnerships to enhance the experience of current, future and matriculated students beyond the classroom.

- Seek opportunities to utilize new technologies to improve the student experience and better support their needs.
- Offer meaningful student employment opportunities that further enhance the student's experiential learning experience.

Goal #9: Provide effective and consistent communication regarding Finance and Administration initiatives, programs, processes and successes.

(This complements the overall theme of UGA's Strategic Plan – Building On Excellence and will complement each Strategic Direction by providing ongoing awareness of these objectives and subsequent successes.)

Action Steps:

- Provide effective and consistent communications regarding the division's strategic priorities, programs, processes, progress and successes.
- Enhance the division's internal communication methods and procedures.
 - Ensure the strategic plan and goals, as well as any subsequent progress or success are readily accessible and visible to the entire Finance and Administration team.
 - Create opportunities for two-way communication that engages administrators in the division with the staff throughout the division.
- Enhance the division's external communication methods and procedures.