2025 STRATEGIC PLAN

2025 UNIT PLANNING TEMPLATE

Unit Name: Finance & Administration

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The Finance and Administration (F&A) team exists solely and exclusively to support UGA's academic and student life missions. In doing so, our goals and action steps are aimed at accomplishing three **fundamental objectives**.

First, all actions should position F&A to provide the best possible support to UGA's faculty, staff and students so they are able to accomplish the goals contained in UGA's Strategic Plan. Secondly, we strive to keep the campus functioning properly through the basic infrastructure and services that our campus partners depend on us to provide. And third, by making sure we meet the fiscal accountability, the campus safety, and the compliance responsibilities that are vested with F&A – responsibilities we take very seriously and that can only be fulfilled successfully when we partner effectively with our academic colleagues.

As we execute our fundamental objectives, service and stewardship reign as the cornerstones for our **mission statement** which is to provide exceptional service and stewardship of the University's financial, human and physical resources. Our **core values** of integrity (personal and professional), teamwork through mutual respect and fairness, excellence in service and innovation and a student-centric approach, reflect the characteristics we want to define our team – as well as how we want others to view F&A. Our core values are intrinsically connected through the accountability we have to the University community and to other F&A team members.

Stemming from our core values is the overarching belief that F&A must strive to be a trusted advisor to the University. Again, because the sole purpose of the F&A team is to support and enable the University to achieve the excellence it aspires to through its instruction, research, public service and student life missions, everything we do must be executed in close collaboration with our partners from across the institution and by relentlessly striving to become the trusted advisors on which the University depends. As we embrace the University's 2025 strategic plan, F&A directs focus toward six **themes/opportunities**:

- ✓ Continuous Process Improvement: Through the use of data analytics, Finance & Administration will seek to continuously improve processes by focusing on root causes, elimination of unnecessary tasks, and innovative improvements.

- ✓ Peer Review & Assessment: To stay attuned to the competition from other institutions, Finance & Administration will seek out best practices and innovation on other campuses and amongst our business partners to support a best in class experience at UGA.

- ✓ Communication & Service: Finance & Administration will seek intentional strategies to ensure a customer-service focus throughout the division that demonstrates our core values and encourages collaboration with our University partners and customer feedback opportunities that result in recognizable change.

- ✓ <u>Purposeful Partnerships</u>: Finance & Administration will intentionally engage across the university to foster and enhance meaningful partnerships. Our engagement will extend beyond the university, as needed, to strengthen the support F&A is able to provide.

- ✓ <u>Diversity Focus</u>: Finance & Administration is dedicated to equity, diversity and inclusion as we strategically and carefully support, guard and share the precious resources entrusted to us; people, facilities, and finances.

- ✓ <u>Succession Planning & Professional Development</u>: Through effective recruitment, retention, and succession planning, Finance and Administration will build our team for enhanced service with F&A and beyond. We will foster a variety of professional development opportunities to better equip, empower and support the growth and development of our individual staff and the many teams that comprise F&A.

The Finance and Administration division appreciates and values the responsibility and trust the University has in our ability to serve.

Strategic Direction I: Promoting Excellence in Teaching & Learning

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Strategic Goal 1.1: Expand experiential learning opportunities for all students.

Unit Goal (Auxiliary Services): Increase the number of experiential learning opportunities available in Auxiliary Services. (Learning opportunities include the areas of nutrition, dietetics, foodservice management, marketing, business analytics, accounting/financial management, golf course management, computer science, transportation, contracts and grants management, and logistics/supply chain management.)

> **Key Performance Indicator**: The number of students learning through Auxiliary Services opportunities as approved by the Office of University Experiential Learning.

> **Data Source**: Office of University Experiential Learning database.

> **Annual Targets:**

FY2021	Maintain current Experiential Learning opportunities within Auxiliary Services. Plan for expansion of EL opportunities and get approval from the Office of University Experiential Learning. Publicize and implement the AS program to incentivize and entice students to enroll in Auxiliary EL experiences.

FY2022	Increase the FY2021 baseline students enrolled in Auxiliary EL opportunities by 20%. Evaluate and update program.
FY2023	Further increase EL opportunities by 10%. Evaluate and update program.
FY2024	Further increase EL opportunities by 10%. Evaluate and update program.
FY2025	Further increase EL opportunities by 10%. Evaluate and update program.

Unit Goal (Facilities Management Division): Facilitate the use of campus as a living laboratory for experiential learning by creating natural, social and built environments that support student learning and research while addressing real world challenges.

Key Performance Indicator: Number of sustainability-focused grants, internships, capstone projects, experiential and service-learning courses, and other transcript-eligible experiential learning opportunities that directly support campus operations to reduce resource use and enhance staff and facility performance

Data Source: Office of Sustainability, Interdisciplinary Certificate in Sustainability, Office of Service-Learning, Office of Experiential Learning

Annual Targets:

FY2021	Develop a structure to formalize, track, and measure outcomes from sustainability-focused operational experiential learning initiatives, and establish a baseline
FY2022	Develop coordinated, accessible operational data streams to facilitate use by faculty and students for teaching and research
FY2023	10% increase in academic/operational projects and partnerships from base line
FY2024	15% increase in academic/operational projects and partnerships from base line
FY2025	20% increase in academic/operational projects and partnerships from base line

Unit Goal (Office of University Architects): Support and increase the number of transcript eligible experiential learning opportunities within F&A.

Key Performance Indicator: Number of annual transcript eligible internships completed by students at OUA.

Data Source: Office of University Architects

Annual Targets:

FY2021	Completion of two (2) transcript eligible internships.
FY2022	Completion of two (2) transcript eligible internships.
FY2023	Completion of two (2) transcript eligible internships.
FY2024	Completion of three (3) transcript eligible internships.
FY2025	Completion of three (3) transcript eligible internships.

Strategic Goal 1.2: Enhance training, support, and recognition for all who provide instruction.

Unit Goal (Environmental Safety Division): In collaboration with the Office of Research Integrity and Safety, expand and enhance safety and regulatory compliance training opportunities for institutional stakeholders that are specifically impacted by environmental safety and compliance issues.

Key Performance Indicator: Delivery of at least two new online safety and compliance training modules through the Professional Education Portal (PEP) during the strategic plan period that result in upward trends in trainee enrollment and positive course evaluations.

Data Source: UGA Professional Education Portal

Annual Targets:

FY2021	Determine target audience and training priorities through multiple initiatives such as stakeholder groups, surveys, existing compliance data, etc.
FY2022	FY 2022 – Based on priorities and target audience, create, publish and/or enhance two training modules identified in FY2021.
FY2023	Deploy training developed during FY2022 and create, publish and/or enhance other training identified in FY2021.
FY2024	Deploy additional training and collect enrollment data from currently deployed modules.
FY2025	Analyze quantitative data to measure efficacy of deployed training and identify opportunities for enhancements.

Unit Goal (Environmental Safety Division): In collaboration with the Office of Research Safety, provide enhanced support to the extended UGA campuses in the areas of RCRA compliance, environmental compliance, occupational safety, fire safety, and EHS Information Systems.

Key Performance Indicator: Implementation of training, safety and compliance programs and the Chematix Chemical Inventory module at UGA's extended campuses.

Data Source: PEP and Chematix

Annual Targets:

FY2021	With risk-based prioritization, conduct initial chemical inventory, assess compliance, safety and training needs at extended campuses.
FY2022	Implement safety and compliance programs to address gaps identified in FY2021; Initiate Chematix chemical inventory module; Deploy training identified in FY2021.
FY2023	Conduct routine periodic safety and compliance inspections and begin collecting baseline compliance and training data. Fully implement Chematix chemical inventory.
FY2024	Continue routine inspection and training. Analyze quantitative data to measure efficacy of deployed training and identify opportunities for enhancements.
FY2025	Continue routine inspections and training, implement enhancements identified in FY2024.

Unit Goal (Environmental Safety Division): Develop and deploy a system to gather occupational injury data. Use data to guide a risk-based approach to safety program development and as a lagging indicator of safety program success.

Key Performance Indicator: Ability to calculate occupational injury rates for all incidents requiring medical treatment beyond first aid and to calculate a Lost Time Injury Frequency Rate (LTIFER), Lost Time Injury Incidence Rate (LTI) and Total Case Incident Rate (TCIR) for benchmarking with peer institutions.

Data Source: Human Resources

Annual Targets:

FY2021	In coordination with HR develop and deploy strategies for injury data collection. Leverage HR injury reporting methods to gather data.
FY2022	Implement the data collection strategy and begin collecting injury data for all UGA employees.
FY2023	Evaluate strategy success and calculate injury rates for previous year. Identify injury trends at the department level and identify safety program needs.
FY2024	Compare FY22 and FY23 data. Establish initial risk groups and communicate findings with area management.
FY2025	Calculate injury trends for FY22 to FY24. Benchmark injury trends with other peer institutions using TCIR. Identify additional risk groups on campus and evaluate safety programs.

Unit Goal (Environmental Safety Division): Develop/purchase and deploy employee computer-based training (CBT) opportunities for Occupational Safety topics identified and prioritized, based on risk, by the Occupational Safety Manual workgroup.

Key Performance Indicator: Rate of employee completion of Occupational Safety trainings in PEP.

Data Source: PEP Administrator, Training and Development

Annual Targets:

FY2021	Establish training topic needs. Determine feasibility of securing funding for purchasing a training subscription from and approved PEP CBT vendor. Purchase or begin development of training based on risk.
FY2022	Identify employee groups and designate topics for safety training based on workplace hazards. Communicate training opportunity deployment to work unit supervisors.
FY2023	Review PEP training completion rates and evaluate program success.
FY2024	Further identify employee groups and provide training opportunities for additional topics as necessary. Evaluate rate of training completion.

FY2025	Survey work unit supervisors for program improvements. Make any necessary customer service improvements.

Unit Goal (Facilities Management Division): Enhance training, support, and recognition for all who provide innovative sustainability-focused instruction.

Key Performance Indicator: Number of faculty who participate in interdisciplinary sustainability-focused faculty development opportunities, such as curriculum workshops, mini-grants, faculty learning communities, awards, and coordinated interdisciplinary experiential learning programs

Data Source: Office of Sustainability, Interdisciplinary Certificate in Sustainability

Annual Targets:

FY2021	Establish baseline participation
FY2022	Increase participation by 5% over baseline
FY2023	Increase participation by 5% over baseline
FY2024	Increase participation by 5% over baseline
FY2025	Increase participation by 5% over baseline

Unit Goal (Finance Division): Create and implement educational resources and programs in partnership with distributed departmental staff, faculty and leadership to increase overall UGA community knowledge, provide educational opportunities for new hires, and ensure compliance across all units.

Key Performance Indicator: Establishment of the FACTS program and increased use

Data Source: Finance Division

Annual Targets:

FY2021	Establish user base for educational programs, including launch of FACTS program.
FY2022	Increase user base for educational programs by 5% (new unique end users).
FY2023	Increase user base for educational programs by 5% (new unique end users).

FY2024	Increase user base for educational programs by 5% (new unique end users).
FY2025	Increase user base for educational programs by 5% (new unique end users).

Annual Targets:

FY2021	Develop standardized customer feedback tools to distribute following training sessions provided by Finance Division.
FY2022	Increase customer feedback rating by 5%. Revise materials and/or course offerings accordingly.
FY2023	Increase customer feedback rating by 5%. Revise materials and/or course offerings accordingly.
FY2024	Increase customer feedback rating by 5%. Revise materials and/or course offerings accordingly.
FY2025	Increase customer feedback rating by 5%. Revise materials and/or course offerings accordingly.

Unit Goal (Human Resources): Launch and maintain the Presidential Initiative to promote excellence and support and recognize those who provide instruction.

Key Performance Indicator: Increase attendance and utilization of courses and programs by 5% each year.

Data Source: PEP System Data

Annual Targets:

FY2021	Phase 1: Launch Professional Development Portal, Implement Base staff competency model. Introduce professional develop base plans.
FY2022	Phase 2: Onboarding and orientation, Grant Program, Expert Bench and Exit Interviews
FY2022-B	Phase 3: Mentoring program, Performance Management, Talent Management managers tool kit, Face to face professional development
FY2023	Measure effectiveness and adjust
FY2024	Continue to monitor metrics

Unit Goal (Human Resources): Promote collaboration with academic units by onboarding units onto the PEP system to support research certifications and training.

Key Performance Indicator: Increase the number of units that onboard each year

Data Source: PEP System Data

Annual Targets:

FY2021	Phase 1 – Onboard 8 organizations
FY2022	Phase 2 – Onboard 10 additional units
FY2023	Phase 3 – Onboard 12 additional units
FY2023	Phase 4 – Onboard 14 additional units
FY2024	Phase 5 – Onboard 15 additional units

Strategic Goal 1.3: Enhance infrastructure and support for evidence-based teaching methods across the curriculum.

Unit Goal (Office of University Architects): Provide planning and project management support for capital projects that result in enhanced infrastructure for evidence-based instruction.

Key Performance Indicator: Completion of planning, programming, and/or design deliverables, as well as construction for funded projects.

Data Source:

Annual Targets:

FY2021	Complete Driftmier Instructional Center Ph. 2 renovations Complete Driftmier Instructional Center Ph. 3 design Complete Poultry Science new building design
FY2022	Complete Driftmier Instructional Center Ph. 3 renovations
FY2023	Complete Poultry Science new building construction
FY2024	Complete EHS Building renovation design
FY2025	Complete EHS Building renovations

Strategic Goal 1.4: Promote academic access and success for all students, with particular consideration for underrepresented, rural, first-generation and other underserved students.

Strategic Direction II: Growing Research, Innovation, & Entrepreneurship

Strategic Goal 2.1: Provide resources, support, and incentives to nurture a diverse and inclusive culture of excellence in research, innovation, and entrepreneurship.

Unit Goal (Finance Division): Enhance work performance and campus-wide partnerships with strategically focused customer service improvements, including development and implementation of best practice service standards that will augment resources and support excellence in research, innovation, and entrepreneurship.

Key Performance Indicator: Establish baselines of partnership and best practices along with monitoring user-ship

Data Source: Finance Division

Annual Targets

FY2021	Establish baselines of partnership and best practices. Identify underrepresented stakeholder groups.
FY2022	Review best practices and increase partnerships
FY2023	Review best practices and increase partnerships
FY2024	Review best practices and increase partnerships
FY2025	Review best practices and increase partnerships

Annual Targets

FY2021	Complete standards development; develop star rating process; Multi-step implementation: Finance Division, then HR, then other F&A units
FY2022	Complete implementation for all F&A; Review standards and procedures and make updates as needed; Increase rating by .25 Stars until maintaining a 4/4+ rating (out of 5)
FY2023	Review standards and procedures and make updates as needed; Increase rating by .25 Stars until maintaining a 4/4+ rating (out of 5)
FY2024	Review standards and procedures and make updates as needed; Increase rating by .25 Stars until maintaining a 4/4+ rating (out of 5)
FY2025	Review standards and procedures and make updates as needed; Increase rating by .25 Stars until maintaining a 4/4+ rating (out of 5)

Unit Goal (Finance Division): Implement use of automated technology tools to increase efficiency and accuracy for financial processes that support research, innovation, and entrepreneurship activities.

Key Performance Indicator: Evaluate opportunities to implement automation technology

Data Source: Finance Division

Annual Targets

FY2021	Evaluate current list of potential processes for development. Expand current plan for automation across Finance Division. Implement 2 internally.
FY2022	Develop best practices guideline for automating processes. Implement 2 internally.
FY2023	Evaluate list to focus on processes shared with customers. Partner on prioritizing list. Implement 2 as beta implementations.
FY2024	Implement 4 additional processes. Identify and engage with new partners.
FY2025	Implement 4 additional processes. Identify and engage with new partners.

Strategic Goal 2.2: Promote collaboration among academic units and between these units and external organizations to drive interdisciplinary research and commercial activity.

Strategic Goal 2.3: Align the human and physical capital of the University to expand the research enterprise and fuel innovation and entrepreneurship at all levels of the organization.

Unit Goal (Environmental Safety Division, Environmental Compliance): In coordination with OUA, FMD, the Office of Research, and the College of Engineering, develop and implement a comprehensive wastewater strategy for the facilities serving the FMD Bioconversion operation, the New Materials Institute Research Facility, and the College of Engineering Materials Testing Laboratory within the Bioconversion Center area on Whitehall Road.

Key Performance Indicator: Development of short and long-term wastewater strategy for the facilities and operations in the Bioconversion Center area.

> **Data Source:** Georgia EPD, Nutter and Associates, Athens Clarke County Environmental Health Department.

> **Annual Targets:**

FY2021	Work in collaboration with FMD, OUA, NMI, and Engineering to determine characteristics of wastewater and to identify compliant methods to handle wastewater.
FY2022	Obtain necessary permits or amend current permits for wastewater management.
FY2023	Implement permit allowances and requirements.
FY2024	Assist FMD in monitoring and maintaining compliance.
FY2025	Assist FMD in monitoring and maintaining compliance.

Unit Goal (Environmental Safety Division): In collaboration with FMD, develop and implement an innovative strategy for permitting and operating a compliant and efficient mulch production and/or composting facility at the Bioconversion Center to enhance research conducted by multiple academic units and research centers.

> **Key Performance Indicator:** Obtaining the appropriate Mulch/Composting Operation permit through EPD.

> **Data Source:** Georgia EPD

> **Annual Targets:**

FY2021	Work in collaboration with FMD, OUA, and environmental consultants to assess feasibility and requirements of the various classes of mulch/composting operations.
FY2022	Obtain necessary permits and/or amend current permits for the mulch/composting operation.
FY2023	Implement permit requirements for the chosen class of mulch/composting operation.
FY2024	Assist FMD in monitoring and maintaining permit compliance.
FY2025	Assist FMD in monitoring and maintaining permit compliance.

Unit Goal (Environmental Safety Division): Develop, deploy, and facilitate the maintenance of improved chemical purchasing functionality through UGAmart with the objective of eliminating redundant procurement systems and simplifying hazardous chemical inventory tracking for the research enterprise.

> **Key Performance Indicator:** Success of the laboratory safety review and approval step within UGAmart.

> > **Data Source:** Office of Research, Central Research Stores, University Procurement

> > **Annual Targets:**

FY2021	Phase out existing iLabs chemical procurement solution and deploy new UGAmart functionality.
FY2022	Gather feedback from requisitioners regarding workflow changes and efficiencies gained through the use of a single system for all lab procurement needs.
FY2023	Organize workgroup in collaboration with The Office of Research to establish new chemical inventory guidelines for laboratories that align with new hazardous chemical tracking protocols.
FY2024	Analyze chemical inventory reconciliation/auditing options and best practices for laboratories in collaboration with the Research Safety Committee (RSC).
FY2025	Implement updated reconciliation/audit procedures based on workgroup and RSC recommendations.

Unit Goal (Facilities Management Division): Support research, innovation, and interdisciplinary collaboration through the design, construction, operation, and maintenance of campus facilities and infrastructure to develop innovative solutions to grand challenges

> **Key Performance Indicator:** Number of projects that engage faculty, students and external partners from multiple disciplines to implement innovative practices in campus buildings, grounds and operations to fuel student learning and research that addresses grand challenges

> > **Data Source:** Office of University Architects, Facilities Management Division, Auxiliary Services, Office of Sustainability

> > **Annual Targets:**

FY2021	Enhance design and construction standards and processes to prioritize interdisciplinary collaboration and accommodate research, innovation, and sustainability

	Develop a coordinated program to facilitate interdisciplinary collaboration and external partnerships in design, construction, operation, and/or maintenance of campus buildings, grounds, and/or operational systems
FY2022	Implement 1 coordinated pilot project, document lessons learned, and enhance approach for subsequent projects
FY2023	Implement 1 or more projects
FY2024	Implement 1 or more projects
FY2025	Implement 1 or more projects

Unit Goal (Office of University Architects): Provide planning and project management support for capital projects that improve the quality and quantity of university research, innovation, and entrepreneurship spaces.

Key Performance Indicator: Completion of planning, programming, and/or design deliverables, as well as construction for funded projects.

Data Source: Office of University Architects

Annual Targets:

FY2021	Complete Poultry Science new building design. Complete STEM Ph. 1 construction. Complete STEM Ph. 2 design. Complete Spring Street Building renovation.
FY2022	Complete STEM Ph. 2 construction. Complete Science Hill Ph. 1 design. Complete HSC Research/Wet Lab facility design.
FY2023	Complete Poultry Science new building construction. Complete Science Hill Ph. 2 design. Complete Poultry Science renovation design.
FY2024	Complete Science Hill Ph. 1 renovations. Complete HSC Research/Wet Lab facility construction.
FY2025	Complete Science Hill Ph. 2 renovations. Complete Poultry Science renovations.

Strategic Goal 2.4: Enhance communications about the University's strengths in research, innovation, and entrepreneurship and the impact of those activities on local, state, national, and international communities.

Strategic Goal 3.1: Increase collaborative, community-focused research, scholarship, technical assistance, and training in Georgia, across the nation, and world.

Strategic Goal 3.2: Strengthen UGA's role in economic development across the state, with a particular emphasis on underserved communities.

Strategic Goal 3.3: Broaden opportunities for students to engage with the diversity of communities in Georgia and across the nation and world on locally identified needs and issues.

Strategic Goal 3.4: Develop high-impact global partnerships that engage and support UGA areas of research and service excellence.

Strategic Goal 3.5: Strengthen communications regarding how UGA sustainably supports and benefits communities through research, teaching, and public service.

Unit Goal (Finance Division): Expand efforts to collect and analyze existing and new institutional financial data to enhance communication about the University's financial impact on research, teaching, and public service activities and to support informed institutional decision making regarding overall performance. Publish and share both internally and with external stakeholders to improve communications and partnerships.

Key Performance Indicator: Enhance financial decision-making in a systematic way

Data Source: Finance Division

Annual Targets

FY2021	Utilize new or existing data sources to improve or develop 2 dashboards. Monitor data for patterns, changing trends. Focus on internal decision making.
FY2022	Utilize new or existing data sources to improve or develop 2 dashboards. Monitor data for patterns, changing trends. Partner with new stakeholder group on new development.
FY2023	Utilize new or existing data sources to improve or develop 2 dashboards. Monitor data for patterns, changing trends. Partner with new stakeholder group on new development.

FY2024	Utilize new or existing data sources to improve or develop 2 dashboards. Monitor data for patterns, changing trends. Partner with new stakeholder group on new development.
FY2025	Utilize new or existing data sources to improve or develop 2 dashboards. Monitor data for patterns, changing trends. Partner with new stakeholder group on new development.