# Finance & Business Strategic Plan: 2014 – 2018

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EXECUTIVE SUMMARY

Penn State’s Finance & Business (F&B) organization is nearly 2,800 full-time and 4,400 part-time employees strong. The experience, talent, and work ethic of our employees powers F&B through its daily operations across the commonwealth. Each employee helps to make F&B stronger, and a stronger F&B builds a better foundation for Penn State’s education, research, and service missions and for advancing the institution as a student-centered University.

As we begin the rollout of this new five-year strategic plan, it is important to acknowledge that the past few years at Penn State have had a profound impact on each one of us. It has been a stressful and challenging time. The response of F&B to these challenges and the way that everyone has come together to forge the future is noteworthy. F&B will take this opportunity to re-focus its efforts and concentrate on what is good about Penn State and how to make it better, striving to turn our University into a model for other institutions to follow. These efforts clearly set the stage for an exciting and transformational future.

The theme for the 2014-2018 strategic plan is sustainability in the broadest possible sense. We refer not only to environmental sustainability, but also to organizational, financial, physical, and social sustainability. All dimensions of sustainability are important if Penn State is to prosper and serve effectively in the years ahead.

This five-year strategic plan focuses on updating and modernizing our business processes, advancing the diversity of our workforce, streamlining and optimizing our services, transforming our information technology services, and revitalizing our workforce in new and meaningful ways. As you read through this strategic plan you will see in detail how we have set goals and objectives to accomplish our strategic priorities. Each goal has a timeline and a performance indicator. We will track these goals and hold ourselves accountable for executing the plan.

Admittedly, this is an ambitious plan and will require the efforts of many within F&B to be successful. As with any plan of this magnitude, a number of changes will occur that will affect F&B, as well as the University. We need to be mindful of the impact that change, and the pace of change, may have on the organization. We will take steps to minimize negative impacts by analyzing each initiative, assessing the ability and capacity to change, and committing to greater communication on the initiatives.

Lastly, this F&B strategic plan will be a living document for its five-year lifespan. We will be looking for feedback and participation, and all employees are encouraged to reference it regularly to understand where F&B is going and what we are doing to get there.

We have come a long way, and the road ahead holds more challenges. I am confident that we will accomplish the goals and priorities we have set for F&B and that our accomplishments will make the Penn State community an even better place.

David Gray  
Senior Vice President for Finance & Business/Treasurer
STRATEGIC PLANNING GUIDELINES

Finance & Business has embedded the guideline elements from the Provost’s memo dated June 14, 2014 within our strategic planning document. These guidelines provide a framework for each unit but allow F&B to craft a plan that addresses our specific needs, mission, priorities, and culture. The summary below shows how the guidelines were used by F&B and where they are specifically addressed within the strategic plan.

1. An articulated vision of your unit’s future over the next five to ten years.

The section titled “Finance & Business Framework” (page 12) details F&B’s Mission, Vision, and Values. F&B Guiding Principles are detailed on page 14. Simply, our vision is “to make Penn State better for current and future generations by focusing on sustainability, excellence, and quality in our people, service, and stewardship.” Our strategic priorities and strategies are born out of this vision and it provides our entire organization a clear focus on our future.

2. A discussion of specific strategies to achieve the vision.

The F&B strategic plan details five strategic priorities that will lead us through the next five years and enable us to realize our vision. The priorities were identified and refined by leadership as the most pressing areas on which to focus our energies and resources for the continued improvement of F&B in service to the University. The priorities are detailed in the Strategic Priorities section, beginning on page 15. They include the following:

- Business Process Transformation, page 17
- Advancing Diversity & Inclusion, page 19
- Economic and Structural Review of Finance & Business Services, page 21
- Transformation of Information Technology (IT) Services, page 23
- Workforce Excellence and Vitality, page 25

3. For academic units: A discussion of plans, progress, and initiatives in learning outcomes assessment.

Not applicable to F&B.

4. Strategic performance indicators structured around unit level goals.

F&B has a strong history and culture of tying performance indicators to goals. This plan is no different. Each of our strategic priorities has a number of goals identified that will lead to the accomplishment of the overall priority. With each goal, objectives have been established along with metrics, specific timelines, resource needs, and barriers.
5. Diversity planning.

F&B has included diversity as part of its strategic planning for two decades, and this plan, once again, focuses on Advancing Diversity & Inclusion as a strategic priority. While much work has been done, more remains, and our commitment to being a leader in this area is strong.


The Economic and Structural Review of F&B Services Team will review and follow up on the Core Council recommendations presented to F&B. The team will determine which recommendations have been completed and which remain to be implemented. As service reviews are conducted, the team will work with each unit involved to consider implementation of any outstanding Core Council items as part of the final recommendations of the review.

7. Information on practices that promote integrity and ethical behavior.

The Office of Ethics and Compliance falls within F&B and provides a wide range of guidance and support to F&B, as well as to the entire University. This office was recently created and much work has been accomplished in a short time, including the hiring of key staff, the development of a University-wide Compliance Plan, the completion of a Values and Culture survey, the development of more rigorous tracking of compliance training, and the establishment of an Ethics and Compliance Council. Going forward, the Office of Ethics and Compliance will continue to develop, implement, and assess policies, standards, programs, research, and education concerning the University’s ethical values, ethics culture, and ethical decision-making practices.

8. Discussion of how the unit is contributing toward Penn State’s goals for sustainability.

Sustainability, in the broadest of definitions, is the theme for this F&B strategic plan. We will address each priority with sustainability in mind and incorporate sustainability into specific actions. This builds upon our previous strategic plan, in which Environmental Stewardship was one of our key initiatives. F&B used that initiative to lead and advance the University’s stance and culture in sustainability. Through these efforts the Sustainability Institute was created and a University-Wide Sustainability Master Plan was initiated. Moving forward, F&B is transitioning the Key Initiative team to a F&B Sustainable Operations Council that will be responsible for maintaining and advancing the unit’s sustainability efforts. The council will continue to provide leadership and education across the institution in considering sustainability in every decision we make.
9. Correlation of strategic initiatives to budget planning and adjustments.

F&B has an annual strategic budget planning process that focuses on determining the most critical needs across the organization and re-allocating funds as needed to support the mission. A number of cost savings initiatives have been implemented throughout the past five years and the units will continue to search for ways to be more efficient and effective. Strategic investments will be made that will result in direct and indirect savings. The Economic and Structural Review of F&B Services Team will play an integral role in these efforts during the life of this strategic plan.
THE STATE OF FINANCE & BUSINESS

Finance & Business is a vibrant, productive, and integral part of Penn State. The men and women that form the F&B team help to ensure that the day-to-day work of the University is accomplished in an effective, efficient, and successful manner. F&B is a complex business organization with significant service and stewardship responsibilities.

There are fourteen administrative units within F&B that provide an array of services ranging from finance to safety, compensation to investment, food service to real estate, construction to parking, and more. F&B directly or indirectly oversees administrative operations at all Penn State locations. The F&B units include the following:

- Auxiliary & Business Services
- Commonwealth Operations
- Office of the Corporate Controller
- Office of Diversity & Inclusion
- Enterprise Project Management Office
- University Ethics and Compliance Office
- Office of Human Resources
- Office of Internal Audit
- Office of Investment Management
- Office of Licensing Programs
- F&B at The Milton S. Hershey Medical Center
- Office of Physical Plant
- University Police and Public Safety
- Office of the Vice Provost for Information Technology

A description of each of these units can be found at www.fandb.psu.edu.

F&B has nearly 2,800 full-time and 4,400 part-time employees at all locations. Currently, our profile consists of these components:

- 15 executives and administrators
- 1,002 full-time staff
- 1,747 full-time technical service employees
- 12 average years of service
- 24 campus locations
- An operating budget of nearly $500 million annually
- $160 million – the average annual cost of construction
- Through clearly written and carefully structured past strategic plans, F&B has made noteworthy progress and is arguably one of the most successful support organizations—from service, delivery, and cost perspectives—in higher education. This progress underscores the importance that the present strategic plan, carrying
our organization through 2018, will have in supporting our continued forward movement and in addressing areas that historically have been challenging.

Strengths, Challenges, and Environmental Issues

Strengths

• Our key organizational strengths that we hope to foster and leverage through the timeframe of this plan are as follows:

• A dedicated workforce that is deeply committed to Penn State and proud to be part of an internationally regarded and highly successful institution.

• An organization that embraces teamwork and accomplishes its goals. F&B employees have a genuine desire to succeed and to help our colleagues succeed as well.

• F&B's focus on key initiatives (strategic priorities) has been extremely successful on many levels within F&B and the entire University. The process of identifying critical strategic issues, organizing cross-functional teams to address the issues, appointing strong leaders to guide the teams, and providing resources for achieving desired outcomes has made a significant difference.

• Leadership within all levels of the organization is strong and accountability is valued. A new generation of leaders is emerging that represents a healthy blend of internal and external talent.

• F&B values the use of data and information as an integral basis for decision making. Units are adept at creating and publishing information and incorporating it into F&B's strategic planning. This ensures that decisions are based on fact – not intuition.

• F&B operates efficiently and effectively, with fewer resources relative to our peer institutions. We continue to search for ways to work in a less costly way, so that resources can be reallocated strategically to meet the University's teaching and research needs.

• F&B has developed a deep and effective culture of customer service. A focus on service for the past several years has taken root and is seen throughout every part of the organization. F&B understands that service is the reason we exist as an organization.

• F&B employees possess a strong work ethic. Our staff members perform quality work and are not satisfied until the job is complete. Because of its dedicated and focused team, F&B provides exceptional service and can exceed customer expectations.

• F&B is committed to providing access to training and development opportunities for all members of the organization.
• Building from the Environmental Stewardship key initiative, sustainability has been embedded throughout F&B and the University, making us a leader in this regard among our higher education peers. We evaluate and consider every decision we make and how it will affect people, operating costs, and the planet.

**Challenges**

While F&B is fortunate to have great people, depth of skill, and organizational strength, we face several challenges that are important to consider in the development of our next set of priorities and goals. The most notable of these challenges are listed below:

• While our most recent Diversity & Inclusion Climate Survey disclosed measurable improvement in attitudes and behaviors, we still have a long way to go to be truly reflective of the increasingly diverse society within our workforce. We understand that a diverse and talented team is a key ingredient to long-term success and achievement of our vision, because each individual brings a skill set and experiences that strengthen our entire organization. From our previous strategic plan, the Fostering Diversity key initiative has helped the organization progress over the years. However, we have not reached our goals and must continue to find new ways to bring more people of all backgrounds, experiences, and capabilities to F&B and to foster a climate of trust and respect throughout F&B.

• Penn State has a pronounced level of information technology (IT) infrastructure fragmentation. This high degree of IT decentralization could be rationalized when resources were more plentiful. However, we have entered a protracted period of resource scarcity, and fragmented IT services are a costly model the University can no longer afford. F&B should take the lead in developing and instituting a “shared services” model for IT infrastructure and related support.

• Fiscal pressures continue to challenge the University. Support from the state remains flat but still a significant piece of the financial model. Pressure to keep costs at a minimum for students continues to be a primary focus. Health care costs, retirement benefits, and the ability to attract and retain top-quality staff are a few of the major issues that create an unsteady financial future.

• F&B provides leadership to the Penn State community in the area of emergency management and in being prepared for unforeseen events. In spite of substantial progress in many areas over the past several years, new concerns over risks for potentially negative events seem to emerge regularly. We need to continue to improve our prevention and response efforts to keep pace with the evolution of identified concerns. Additionally, we need to ensure that all of our operations have effective and regularly tested business continuity and emergency operations plans. Such planning will help to ensure that the University can weather an unexpected event and resume full operation as quickly as possible.
• The recent University Values and Cultures survey identified that more than half of the respondents had concerns about raising issues or problems for fear of retaliation. This is not a new concern and we must commit to eliminating this issue from our organization.

• Within F&B and across the University, significant transformation initiatives are under way and many more are being planned. We recognize that change, while leading to better processes and systems, puts stress on the organization and its people. It is important that we embrace change and continue to drive the organization forward, while at the same time keeping an eye on the capacity for change and implementing strategies that will allow us to successfully position the University for the future.

• Our model for delivering support and service to campuses outside of University Park is uneven and at times shows signs of strain. By better understanding campus needs and necessities, F&B can eliminate the pressure this strain places on campus business officers and provide equal and effective service.

• Because F&B is large, complex, and dispersed, it is a challenge to keep everyone informed on important issues. While significant improvements have been made to the F&B website (along with unit-level websites) and the F&B news stories, there is still evidence that key information is not always reaching all members of the F&B team. We need to develop a broader array of communication tools and channels to ensure that everyone in the organization is on the same page. We also need to recognize that our geographic dispersion throughout the commonwealth adds a layer of complexity to our communication and leadership processes.

**Environmental Issues**

As we leverage our strengths, and work toward meeting our challenges, a number of factors will affect our ability to progress toward achieving our vision. The environmental forces that we expect will exert the most influence on F&B are as follows:

• Competition for the best students, top faculty and staff, and the wide-ranging variety of resources will continue to pose challenges. F&B will need to identify strategies to enable Penn State to compete effectively in these markets.

• Governing boards, government, and the general public will require increased levels of accountability and transparency from higher education institutions. This will be especially evident with respect to compliance, total cost of education, research disclosures, and financial aid policies, among many other areas.

• Volatility will likely continue in the funding environment for higher education at both a federal and state level.

• The rapid pace of technology change, coupled with the increasing demands from our technologically advanced students, employees, and customers, will challenge the
organization as we strive to deliver quality services in support of the University’s mission.

• Cost pressures, brought about by constrained revenue growth and the need to meet market demands, will challenge our ability to resource adequately and provide desired service levels.

• The focus on safety and security on University campuses, highlighted by unfortunate events that have occurred elsewhere over the past few years, will continue to be on the minds of students, their families, faculty, and staff.

• The University’s commitment to be sustainable in everything that we do—organizational, financial, physical, and social responsibility—will continue to expand our efforts on this front.
FINANCE & BUSINESS STRATEGIC PLAN FRAMEWORK

The strategic plan framework sets the direction and overall vision of Finance & Business. It establishes the present groundwork for each employee so that F&B can move forward fully aware of its priorities and values.

Mission

F&B is a service organization that supports Penn State students, faculty, staff, and the public. We are responsible for the planning, management, and stewardship of the University’s human, financial, physical, and environmental resources.

Vision

F&B’s vision is to make Penn State better for current and future generations by focusing on sustainability, excellence, and quality in our people, service, and stewardship.
Values

F&B’s values are intrinsic qualities for an organization that strives to offer superior services to all who are affiliated with the University. These eight values must be embedded in F&B’s daily activities so we can move steadily toward the organization’s vision in a way that is consistent with its mission.

• **Accountability** – We are committed to “owning” our work and serving our customers. We take pride in our successes and are responsible for our shortcomings. Accountability drives our commitment to quality improvement of F&B and each of its units, and it means willingly and confidently accepting tasks to enhance customer service.

• **Customer Service** – We are effective in combining communication, creativity, and hard work to surpass customer expectations. Customer service is at the heart of what we do and we are dedicated to always looking for ways to support our customers more effectively.

• **Diversity & Inclusion** – We affirm the dignity of all individuals, pursue equality of opportunity, and foster diversity.

• **Excellence** – This is the goal in all of our work. We strive to perform at a level that provides exceptional, innovative, ethical, and quality services.

• **Integrity and Ethics** – We create a professional work environment that emphasizes personal integrity, ethics, responsibility, and accountability. This includes “saying what you mean and meaning what you say,” which establishes credibility for all members of F&B.

• **Respect** – We honor the diverse experiences, unique qualities, and knowledge that every person brings to the table. Respect is deserved, not earned, and is the core of how we deal with each other and those with whom we interact.

• **Student Centeredness** – We keep student perspectives, opinions, needs, interests, and safety at the center of every decision we make as an organization. We strive to help Penn State achieve student-centeredness in every facet of its operations.

• **Teamwork** – We recognize that our success is inevitably tied to others, and our performance as a team will define us. We look to successfully partner with others to provide the highest-quality service through customer- and coworker-friendly processes.
FINANCE & BUSINESS GUIDING PRINCIPLES

Our guiding principles are operational ideals that move us closer to achieving our vision. We employ these principles in every process, interaction, and task as a means of maintaining quality and attaining excellence.

- **Academic Collaboration** – While we are not providers of the core services of Penn State (teaching, research, and public service), we support many aspects of each. As we do our work, we look for opportunities to connect with these core activities in meaningful and productive ways. We hire students, our employees teach classes, and we assist faculty in their labs—all examples of how we link into the University's mission.

- **Communication** – Finance & Business is an organization of tremendous size, complexity, and diversity. We provide service to virtually all stakeholders of the University. This places a huge premium on our ability to communicate with each other and with our customers. We adhere to the notion that “there is never enough communication,” and we continuously look for more effective ways to spread the word.

- **Continuous Improvement** – Operations and processes are never perfect, so there are always opportunities to identify improvements for better service, more efficiency, lower cost, and greater effectiveness. We are mindful of our need to maintain control and compliance, but seek to do so without unnecessary steps.

- **Emergency Preparedness** – We live in a world of rapid change and need to be ready to respond to the unexpected. F&B provides leadership to the University in developing plans and processes that will deal with emergencies of many forms. We also lay the groundwork for contingency planning, so that in the event of an emergency, the University can continue to function as effectively as possible.

- **Service to All Campuses** – F&B is truly a University-wide organization with service responsibilities to all units and campuses of Penn State. We seek to create processes and service models that recognize the unique needs and geographic consideration of all of our campuses, and support them effectively.

- **Sound Financial Management** – F&B should be the University's leader in reducing costs, operating efficiently, and identifying creative and new revenue opportunities.

- **Sustainability** – We consider and take responsibility for the full cost of our actions and decisions. We also think about and assess environmental and social impacts on the University and the world.
FINANCE & BUSINESS STRATEGIC PRIORITIES

Strategic priorities, labeled “key initiatives” in the previous plan, provide organization-wide goals that will be the focus of Finance & Business during this strategic plan period. The priorities become a roadmap to positive change and improvement. The strategic priorities for 2014-2018 are as follows:

• **Business Process Transformation**

The University’s ambitious plan to replace its key enterprise systems over the next several years has presented a unique opportunity to rethink and transform core business processes. The University’s competitive position in the future will depend on effective leadership from F&B to implement sustainable enterprise systems that enable efficient, responsive, and seamless service to the University community. The focus of this priority will be to streamline business processes to achieve notable improvements in service responsiveness and efficiency in the management of student services, human resources, payroll, and financial and facilities resources and information.

• **Advancing Diversity & Inclusion**

This priority continues to build on the work that the Fostering Diversity Key Initiatives team accomplished and will focus on proactive recruiting and retention efforts, training and education, the attractiveness of F&B as a place to work, the development of accountability metrics, and more effective communication of our diversity & inclusion goals and accomplishments.

• **Economic and Structural Review of Finance & Business Services**

The service units of F&B have long been successful at monitoring appropriate key indicators and responding to changing demands and constraints. More recently, the impacts of external economic, demographic, regulatory, and other unyielding pressures have elevated the need for more in-depth reviews in order to improve service delivery, financial performance, customer satisfaction, and long-term organizational sustainability. This is further demonstrated by the work and the recommendations of the University’s Core Council. The Services Review team will monitor the implementation status of the Core Council recommendations and conduct additional reviews to ensure that Penn State can continue to offer high-quality services that meet demand, exceed expectations, and are financially sound.

• **Transformation of Information Technology (IT) Services**

Technology is critical for conducting and enhancing business across the University. However, F&B’s current model for delivering technology services is built around departmental silos with redundant implementations of key infrastructure. This model is not cost effective and spreads critical staff and skills thinly. The strategy goals are to transform IT delivery by building unified technology practices, staffing models, and
infrastructure, and leveraging central IT services whenever possible. The desired outcome will be efficient, consistent, and high-quality information technology services across all of F&B.

- **Workforce Excellence and Vitality**

  A great university’s most important asset is its people. We endeavor to define personal sustainability at Penn State and to ensure that the necessary people, policies, practices, and procedures exist to support the ability of every F&B employee to be truly sustainable: to meet all of their individual needs while also meeting the organization’s needs. Our goal is to empower employees to achieve their personal and professional goals and to provide opportunity to succeed as an employee or supervisor, to learn, to be rewarded and recognized, to live a healthier lifestyle, and to participate in all that Penn State has to offer.
BUSINESS PROCESS TRANSFORMATION

The implementation over the next several years of new student, human, financial, and facility asset management systems will require significant investment of resources from across the institution. The University’s well-being depends on timely and effective implementation of these new systems and a well-orchestrated and coordinated approach to transition to the desired model of service delivery that is expected of a world-class institution. Maximizing returns on the significant investment in enterprise systems through a concurrent transformation of core business processes is imperative to provide Penn State with a competitive advantage for the future.

The underlying goals are designed to streamline business processes while achieving notable improvements in service responsiveness and efficiency. Providing management information that is timely and formatted to both customer and user needs is also of paramount importance. Successfully carrying out this endeavor will rest on the leadership of Finance & Business to create a new universal culture of forward thinking that emphasizes agility, communication, continuous improvement, customer service, and risk-informed decision making.

Vision/Mission

F&B will lead the organizational change management and transformation of University business processes needed to implement sustainable enterprise systems that enable efficient, responsive, and seamless service.

Goals

Identify, evaluate, and prioritize critical business processes and policies in need of redesign and transformation in close coordination with enterprise systems implementation efforts.

Design, develop, implement, and adapt processes, policies, and controls grounded in well-documented best practices and in close coordination with enterprise systems implementation efforts.

Establish appropriate portfolio and project management frameworks to support and enable the implementation of sustainable enterprise services and systems while maximizing the utility of selected existing services and systems.

Develop and articulate a clear enterprise-wide strategy for Business Intelligence to drive data-informed decision making through analytics.
Strategic Priority Team

Leader:
Joe Doncsecz, Corporate Controller

Team Members:
Larry Bell   Denise Burkholder
Patti Cochrane  Vicki Doksa
Vincent Falvo   Ken Forstmeier
David Gindhart  Jan Grasser
Joyce Haney     Joe Jones
Debbie Meder   Phillip Melnick
Carrie Moore    Judy Mudgett
Steve Selfe   Jeff Smith
Stephanie Snook  Jean Songer
Jayashree Sonti  Susan Wiedemer
ADVANCING DIVERSITY & INCLUSION

For more than two decades, Finance & Business has made diversity a part of its strategic planning – even before the University’s evolutionary Framework to Foster Diversity Plan. “Diversity and demographics” is one of President Barron’s six main imperatives for Penn State as he begins his term as president. He has clearly stated his reasons from moral, educational, and business perspectives.

Beyond addressing the need for a diverse and inclusive workforce, F&B has strengthened diversity in the University’s business efforts through the Supplier and Contractor Diversity programs. Additionally, because we serve both the internal and external customers of Penn State, we recognize the need to ensure a safe and welcoming climate for all people and for our workforce to be culturally competent.

Now that many of the basics have been covered – celebrating and embracing our differences, as well as recognizing the unique values of everyone and embracing how they work together for the good of all – it is time for F&B to move further in the continuous quest for quality service through quality people. Although we have experienced measurable success in the business areas of purchasing and contracts and we have seen marked improvement in the climate for diversity & inclusion (based on the results of our employee surveys), the diversity of our workforce has remained stagnant as it relates to racial/ethnically diverse employees.

Our forward focus is now on growing and enriching the diversity of our workforce through improved and sustainable recruitment and retention efforts. This includes increasing our pool of qualified applicants (internally and externally); providing guidance, training, and resources to our hiring managers/teams; providing professional and career development opportunities; and ensuring sound and equitable processes that can be implemented and measured. Much of this “heavy lifting” will be done through new/re-activated efforts of the Office of Human Resources. All of these actions must be woven through F&B with a renewed dedication to provide an attractive and welcoming workplace and community for everyone. F&B intends on being a leader in diversity & inclusion just as we have been with the University’s sustainability efforts.

Vision/Mission

To build and sustain a diverse workforce in F&B as we strengthen a welcoming and respectful climate for all.

Goals

Increase the diversity of the F&B workforce through proactive recruitment efforts.

Sustain a diverse F&B workforce by improving the retention of underrepresented employees.
Eliminate fear of retaliation when reporting acts of intolerance and unfair treatment.

Implement specific diversity & inclusion accountability metrics for all F&B employees, departments, and programs.

Coordinate and integrate diversity & inclusion initiatives throughout F&B using centralized communication efforts.

**Strategic Priority Team**

Leader:
Lydia Abdullah, Director of the Office of Diversity & Inclusion

Team Members:
David Brown     Jason Browne
Duane Bullock   Sharon Corl
Vernon Davis    Julie Deal
Carol Eicher    Diane Grimm
Sharon Lucas    Kate Lumley-Sapanski
Richel Perretti Jose Reyes
David Rose      Grace Rohrbach
Roseann Sieminski Lisa Watkins
ECONOMIC AND STRUCTURAL REVIEW OF FINANCE & BUSINESS SERVICES

While this is a new strategic priority for this planning cycle, review of services provided by Finance & Business is certainly not new to the organization. Constant review occurs in all units, and includes ongoing assessments of financial performance and customer satisfaction as well as periodic peer reviews. However, unyielding external economic, demographic, and regulatory pressures have become fixed features of Penn State’s landscape.

As a result of these increasing pressures, and growing customer expectations and resource constraints, it is an appropriate time to join together across the organization to focus strategically on service delivery for potential improvements, restructuring, outsourcing, or other stabilization measures to attain financial and organizational sustainability.

F&B has assembled a team representing different areas of expertise to formalize the process of reviewing services. Using recommendations from the University’s Core Council to help inform the prioritization of the team’s activities, as well as correlating prior initiatives to service improvements and/or costs savings, the Economic and Structural Review of F&B Services Team will re-examine F&B’s cost structures and workforce strategies to assure that Penn State can continue to offer to its constituents high-quality services that are financially sound.

The team recognizes that F&B services are delivered through three funding mechanisms – auxiliary (self supporting, fully costed, externally funded); University services (self supporting, fully costed, internally funded); and education and general (direct costs, tuition, and state-appropriated funding). Regardless of the funding mechanisms, each unit should seek improvements in operating effectiveness and efficiencies.

Vision/Mission

The Economic and Structural Review of F&B Services Team will conduct reviews of services provided by F&B and recommend options on how best to deliver those services while focusing on our guiding principles, including sound financial management, customer service, continuous improvement, and sustainability.

Goals

Develop the processes that will be used to conduct the review of F&B services.

Create a prioritized list of F&B services for review.

Perform a detailed and objective analysis of each service.
Strategic Priority Team

Co-Leaders:
Dan Sieminski, Associate Vice President for Finance & Business
David Rose, Financial Officer for Finance & Business

Team Members:
Kari Allatt Regis Becker
Jennifer Eck Miranda Finocchio
Kim Fisher Dan Heist
Gary Langsdale Dean McCracken
Jody Murawski Lisa Powers
Andy Reisinger
TRANSFORMATION OF INFORMATION TECHNOLOGY (IT) SERVICES

Finance & Business maintains multiple information technology units that support the various business units. The following units have IT staff that report up through the leader of the respective division:

- Auxiliary & Business Services
- Office of the Corporate Controller
- Office of Human Resources
- Office of Physical Plant
- University Police and Public Safety

An additional group of technology staff currently supports the central F&B offices in Old Main along with the offices of the president and the board of trustees. The Hershey Medical Center is not included in the scope of this strategy.

Planning for and executing IT services occurs in silos, with the leader of each IT unit independently developing strategy, directing staff, and serving their own units in general isolation from the other business units. Multiple computing facilities have been built and maintained—each with their own systems (in some cases redundant systems) for power, cooling, and network connectivity. Different technology solutions for implementing networks, servers, desktop deployment, and support have been developed and deployed by each unit. Varying degrees of use of central IT services are also found across the units.

While this model has provided for historically high levels of flexibility, responsiveness, and service to the individual units, it has also resulted in redundant infrastructure and inconsistent practices that as a whole are inefficient. Planning efforts have also been fragmented, with each unit “reinventing the wheel” as they strive to adapt to and plan for new technologies and business needs.

This strategy seeks to unify the delivery and implementation of information technology across F&B, eliminating the silos that currently inhibit efficient planning and implementation. The strategy also seeks to improve efficiencies by leveraging central IT solutions and services whenever possible. A new organization and related governance structure will be conceived and implemented that will guide the planning and prioritization required to implement unified technology solutions. Early stages of the strategy will focus on networks, servers, and desktop computers. The later stages of the strategy will work to better align application development platforms and methodology. End user satisfaction will be monitored throughout the strategy to ensure satisfaction.
Vision/Mission

F&B will lead the University in transforming the management of IT resources, in ways that will continually reduce redundancies, increase efficiencies, and expand capabilities, offering quality services to both internal and external customers.

Goals

Create the organization required to transform the management and delivery of IT services across all of F&B.

Create and implement a sustainable governance structure that will guide future IT decisions, establish priorities, and allocate resources.

Develop and implement standardized and consolidated desktop, network, and server services and support across F&B.

Develop and implement standardized and consolidated practices for the delivery of application development services and support across F&B.

Implement and test F&B-wide disaster recovery and business continuity plan.

Strategic Priority Team

Co-Leaders:
Kevin Morooney, Vice Provost for Information Technology Services
Joel Weidner, Director, Information Systems

Team Members:
Jan Barnoff           Rick Coons
Fred DiMuccio        Gary Grgurich
Huoy-Jii Khoo        Kevin Morgan
Steve Neeper         Rick Ramsay
Susan Taylor          Hazel Weaver
WORKFORCE EXCELLENCE AND VITALITY

Penn State has always maintained that the people within our organization are our most important asset. For more than two decades, we have offered professional development and health and wellness programs, giving employees opportunities to develop and sharpen their work skills and to improve their health. The purpose of this priority is to go beyond what has been offered in the past, expand the scope to include sustainability, and begin to plant the seed for University-wide policies regarding health, wellness, and accountability.

Finance & Business has an opportunity to lead other units across the University by modeling best practices for not only attracting and recruiting the best talent, but also retaining and engaging the talent we already have. By implementing an onboarding process that is consistent across units, every new hire will know the opportunities available to them through career pathing and training.

As employees move through their careers, it is important that those who become leaders perform their duties with integrity and recognize the good work of others. For a supervisor to do this, a meaningful reward program is essential. When employees are rewarded, they tend to be more engaged, and an engaged workforce strives to achieve the goals of the University. This is where personal sustainability complements organizational sustainability.

As the various goals are implemented, meaningful metrics will be collected to validate success.

Vision/Mission

Within the next five years, through our unique contributions within F&B, we will pursue sustainable organizational excellence by enabling and modeling workforce strategies that lead to the attraction, retention, and engagement of a talented and diverse workforce.

Goals

Support healthier lifestyles and congruous health care decisions through workplace flexibility, education, resources, and incentives.

Promote a culture of learning and career growth through robust employee and supervisory development opportunities.

Reward and recognize high performance and employee engagement in a consistent and meaningful way.

Ensure that F&B supports personal sustainability for all F&B employees.
Strategic Priority Team

Leader:
Susan Basso, Vice President for Human Resources

Team Members:
Jeremy Bean        Nathan Cooke
Sue Cromwell       Amy English
Steph Flanagan     Randy Geering
Janda Hankinson    Richard Killian
Cassandra Kitko    Tyrone Parham
Terri Parker       Jeff Popadines
Ric Veruete