

Strategic Goals for Calendar Year 2011

1. Reexamine the Day-to-Day.

Background:	The CFO Division is a sponsor of the \$500 million systemwide efficiency initiative <i>Working Smarter</i> , but do we practice what we preach? Why do we do things a certain way? Have we ever asked the question? If we are going to ask others to question the status quo , we must do so ourselves. Question-asking leads to innovation leads to continuous improvement .
Expectation:	Every person in the CFO Division has the opportunity to question some aspect of our daily business, and in calendar year 2011, they will be expected to do that. Managers will be expected to encourage this from every employee. Our processes and policies are not set in stone. "That's the way it's always been done" is not always a good reason!
How:	Idea submissions, speaking up in meetings, asking peers and supervisors pointed questions, suggesting well thought-out alternatives, addressing continuous improvement in performance reviews, reviewing processes and activities for relevancy, asking yourself, "If I was in charge, what would I change and why?" "How can I do my everyday task better?"

2. Showcase our Value-Add.

Background:	With the new funding streams model going into effect for fiscal year 2011-2012, campuses and medical centers will inevitably ask what value they are getting for their money. How will we justify our existence? It is our responsibility to prove that our services are not only marked by accuracy , expertise , and rigorous analytical thinking , but that they also add real, tangible value to the campus. Maintain specialized staff at UCOP that is difficult to maintain at a campus-by-campus level – we keep these staff so you don't have to.
Expectation:	The way to prove it is with fast, accurate data; thus every department in the CFO Division will be expected to quantify its value-add to the campus on a regular basis. Managers will be expected to determine and track the most appropriate data.
How:	Key Performance Indicators within ERMIS, accurate record-keeping, ongoing data-tracking on all quantifiable aspects of your service/function, sharing success stories outside the division.

3. Engage with the Customer.

Background:	How do we avoid falling into the trap of "The Ivory Tower of OP"? Our role is twofold: deliver expert service and act as a <i>change agent</i> . We must focus on customer service through speed , professionalism , and problem-solving , while simultaneously balancing it with the courage to push through real change. Neither of these can be done well if we don't engage with our customers, get to know their local business environment, and build a balanced rapport.
Expectation:	Every person in this Division whose customer base includes campuses and/or medical centers will be expected to make at least one site visit in calendar year 2011. Managers will be expected to encourage this from every employee.
How:	Find a reason to weave some face time into your existing business. Maybe next time a group or committee holds a meeting, travel to the campus instead of dialing in. Create a customer service feedback survey on SurveyMonkey.com, and administer the survey every 6 months.

4. Develop our Staff.

Background:	It's impossible to improve performance without investing in staff. In order to take the CFO Division to the next level of effective fiscal stewardship , we have to give people the support they need to get there, and that means staff development . In lieu of formal UCOP training, we <i>can</i> offer every staff member three other building blocks for performance improvement: (1) personalized development plans, (2) relevant standards, and (3) meaningful feedback.
Expectation:	Every manager in the CFO Division will help employees write a development plan that: (a) identifies 1-2 appropriate conferences, training modules, certifications, and/or other competence-building activities; and (b) sets at least five position-specific standards of excellence. Performance reviews will incorporate 360-degree feedback, which includes feedback from at least two other non-supervisory individuals (customers, peers, etc.).
How:	Development plans and performance reviews will be the primary development vehicles. Managers should create a menu of competence-building activities from which staff can choose.

5. Be Action-Oriented.

Background:	At UC, the effort to implement change has been going on for years, with many efforts resulting in a report placed upon a shelf to gather dust. How do we ensure that our efforts don't suffer the same fate, that the CFO Division is not guilty of complacency or inaction?
Expectation:	Every person in the CFO Division will be expected to read and understand the finance section of any broad initiative that touches on their area and find a way that he or she can help make the finance imperatives happen, including metrics to measure their own performance.
How:	Start by reading the <i>Commission on the Future</i> final report and the <i>Working Smarter</i> status report. Get involved, speak up, ask questions, and start making small changes. Managers should hold strategic planning sessions to determine the role their department will play.