

## **OFFICE FOR FINANCE AND BUSINESS**

2012-13 Accomplishments and Goals

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During the FY 201-13 the Office for Finance and Business continued to focus on **operational efficiency and effectiveness, fiscal integrity and stewardship of resources, employee development, and consistent delivery of excellent service**. Special emphasis in the upcoming year will be fulfillment of strategic plan initiatives, including the implementation of Business Operations Centers, initiation of the College of Sciences, as well as support of the preparation for the capital campaign.

### **ACCOMPLISHMENTS AND GOALS**

#### **Retail and Hospitality (Campus Enterprises)**

As NC State's retail and hospitality division, Campus Enterprises (CE) provides more than 25 dining locations, full-service catering, four student activity centers, the campus identification card, bookstores and a championship golf course. CE's accomplishments reflect its commitment to customer service and a vision of serving as an innovative campus resource.

University Student Centers has focused on communicating about the Talley project and potential construction impacts while successfully pursuing name adoption of Talley Student Union. As the **Talley Center begins Phase 2 construction on June 1**, facilities improvements are underway to enhance space for student organizations and administrative operations in the existing student centers. Anticipation for the Talley Center is great, with **more than 200 events confirmed in the new facility beginning spring 2014**.

**Trademark Licensing** adjusted royalties and implemented a new minimum royalty per unit program on January 1, 2013, resulting in **significant revenue increases** (*how much?*). Work continues on streamlining and simplifying the application process, creating easier trademark enforcement, and providing creative brand extensions, most recently seen through development of 3D mascot digital files and models with College of Design students.

CE launched a **partnership with U.S. Bank for the Wolfpack OneCard** and is up-fitting space to create a secure site for card production and registration. The newly branded website was recently awarded "**Best Website**" by the **National Association of Campus Card Users**.

University Dining completed **initiatives to mark food allergens in all ingredients** and recipes and established a recipe testing system, which drew national attention from peers as a best practice. "**My Roots are at NC State**" was implemented to highlight the use of local foods and has been embraced by the NC Department of Agriculture as a model program. **Awards include Food Service Director Magazine's Grand Goldie, the City of Raleigh Sustainability Award, the Governor's Award for Excellence (Dietician Lisa Eberhart), and Best Online Catering Menu and**

**Best New Multi-Retail Concept by the National Association of College and University Food Services**, who also selected NC State as its 2014 regional conference site.

University Bookstores' innovative implementation of an **in-store textbook rental program saved students more than \$1.2 million** during the current academic year. Its textbook price comparison site allowed students to search for competitive pricing while increasing the Bookstores' textbook market share 13 percentage points to 85%.

The **Lonnie Poole Golf Course** maintains its ranking as a top 30 U.S. collegiate course, has been **selected to host the NCAA Golf Regionals (Men's 2014, Women's 2015), was named the #1 new golf course in NC by NC Golf Panel**, and is the **first university property in NC and second in the world to be a Certified International Audubon Signature Sanctuary**. Beyond being home to NC State's golf teams, Lonnie Poole Golf Course acts as a "living laboratory", supporting and hosting 42 academic courses and having maintenance oversight by the Turfgrass program.

#### **Key Goals**

CE's top-tier goals for the coming fiscal year are to facilitate the many construction and renovation projects and achieve required funding sources for construction and FFE (Talley \$120M; Oval Food Court \$10M; McKimmon Food Service \$500K; Poole Clubhouse \$6M; Witherspoon Exterior \$500K), accomplish successful openings of new operations, finalize contracts and initiate design for the hotel conference center, and support the upgrade of The State Club.

University Dining and Rave! Catering will continue to extend local and regional partnerships and reputational growth. Bookstores will also look for expansion and collaboration opportunities to extend service locations to campus, extend programs to deliver digital course materials and access to new faculty adoptions, and launch online merchandise sales and sourcing textbooks to offer students lowest costs. Trademark Licensing will reconfigure its advisory council into separate, more focused stakeholder groups, revise the website for greater usability, and implement changes to licensing policies for greater efficiency.

#### **Centennial Campus**

Centennial Campus Development's (CCD) three main areas of focus are property management, design and construction, and leasing in order to foster strategic partnerships between the University and various government agencies and private companies. CCD coordinates extensively with Facilities, Campus Enterprises and the CC Partnership Office as well as other NC State units to achieve these objectives in order to create a competitive advantage and a first-in-class research institution.

In 2012-13, CCD **upgraded Research IV and Partners I public areas** to more closely reflect Class A office space and **consolidated Engineering space in Research II** to modify and allow more space to be leased to external partners, including ABB, with whom CCD initiated dialogue. While **maintaining a record level of occupancy at 99.5%**, CCD increased the space rented by non-University units three percentage points to 35%, and **adjusted rental rates** to better align with external markets and remain competitive.

CCD drives projects that are transformational for Centennial Campus, and by extension, for the University and Raleigh communities:

- **Reinitiated CBC Flex Building:** Resolved outstanding issues with City of Raleigh with regards to zoning conditions to permit project. Developed pre-leasing plan with College of Veterinary Medicine to advance financing/development schedule .
- **Advanced Conference Center/Hotel:** Assisted Concord-Eastridge in Hyatt Place franchise approval, facilitated design concepts, supported financing discussion with lending institutions resulting in two banks still in negotiation.
- **Corporate Research I Renovation:** Upfit of IES Business Incubator and Springboard to new locations in anticipation of Laboratory for Analytic Sciences.
- **Laboratory for Analytic Sciences:** Worked extensively with the federal government to manage design of space in Corporate Research I-Third Floor.
- **North Shore Residential:** Engaged homeowners to effectively communicate and work through legal issues. HOA amendments are in process of being signed, development agreement and ground lease are in review.
- **Greens Apartments (R2 Residential):** Construction initiated and on schedule to deliver first units in October 2013. Working with City of Raleigh regarding how development fees are calculated and assessed against private development projects on campus.
- **Wolf Ridge Student Housing and Dining:** First units and dining are scheduled to open in August 2013.
- **University Town Center:** Market research completed, development of an RFP is underway.
- **College High School Renovation** (To be delivered July 2013)
- **Carol Johnson Poole Clubhouse** construction started (To be delivered November 2013)
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As these projects continue, CCD has also provided significant support in updating the 10-year Centennial Campus Development plan and worked to enhance current amenities and accessibility. For one of these projects, a stream reclamation effort, CCD was also awarded a Sir Walter Raleigh Award.

**Goals**

CCD will complete ground and space leases for CBC Flex, invest in CBC infrastructure projects, and develop the Smart Grid opportunity on Centennial Campus. In addition, CCD will continue to implement the Strategic Leasing Plan to utilize Research I, II and III for smaller, shorter-term external tenants while also working to increase the percentage of external partners in University-owned buildings from 35% to 40% to reduce demands on F&A and M&O funds. For Town Center, CCD will create a timeline for solicitation and issue the RFP to the development community. CCD will also find a creative solution to conference center financing obstacles. In addition, CCD will obtain funding for up to two additional staff positions and broaden engagement with the colleges to provide more opportunities for students to realize the value of Centennial Campus.

**Environmental Health and Public Safety**

Much of the work done by Environmental Health and Public Safety (EHPS) is focused on preventative measures and diligent training to ensure a safe and secure learning and working campus environment. EHPS has received recognition for its expertise and best practices, specifically regarding its assistance to General Administration with developing talking points related to weapons on campus and programs for safety in residence halls and its support to Elizabeth City State University and its Interim Police Chief.

In 2013 University Police was also reaccredited with distinction by the Commission on Accreditation for Law Enforcement Agencies and reaccredited by the International Association of Campus Law Enforcement Administrators. The department worked with University Planning and Analysis to conduct a campus customer satisfaction survey, and 79.8% of respondents felt that University Police “provides a high level of service to the university.” Responses to questions will guide outreach and education.

After the Dan Allen Gates deployment, on-time performance of bus routes improved 13 percentage points to an average of 87%. A new bus fuel contract was negotiated, saving \$600,000 over five years. Transportation has completed security improvements to parking decks via LED lighting and camera installations. Security Applications completed College of Veterinary Medicine security infrastructure deployment and development of a security master plan.

EHPS has collaborated with constituents across campus to achieve optimal preparedness for different scenarios. This included implementing and reviewing severe weather plans with building liaisons and conducting three full-scale disaster exercises: 2012 Vigilant Guard (student passive resistance building occupation), 2013 Shooter Drill (response to shooter with hostages); and 2013 Operation Wolfpack Shelter (tornado drill with evacuation of seven residential facilities). EHPS created client-specific training that included Active Shooter and Workplace

Violence Prevention for the College of Veterinary Medicine and risk management training programs regarding minors on campus, summer athletics camps and cooperative extension, and managed 283 new threat assessment incident reports.

### **Goals**

EHPs will continue its high level of preventative strategies and training along with campus outreach and education to mitigate risks to a safe campus, which will include exercises, drills plans, and policies. There is a need to develop a reasonable suspicion policy for managing suspicions that an employee is under the influence while working.

The opening of the Terry Center is causing a substantial impact on availability of Radiation Safety personnel to respond or cover diverse service needs. Environmental Health & Safety will work to reach agreement with hospital administration on charge-back for services.

The deployment of security technology requires additional staffing for monitoring. A staffing plan and budget is forthcoming. Staffing is also a concern for Environmental Health & Safety and University Police. During the past year, University Police has reduced the number of vacancies from 14 to four. However, the problem with police will continue as long as municipalities offer raises and the State does not.

### **Facilities and Operations**

The Facilities division practices forward-thinking strategies to improve efficiency and effect cost savings at NC State. Sustainability is a special focus area of continual improvement with consistent results. For example, an increased breadth of holiday setbacks achieved \$282,000 in savings during a shorter break. Facilities implemented energy savings projects totaling \$1.5 million using utility savings carry forward funds. An in-house team completed recalibration of four buildings to ensure optimal system efficiency and connected multiple facilities to the chilled water loop for greater reliability and efficiency. So all of campus can have better visibility on energy efficiency, Facilities implemented an energy dashboard that allows building occupants to view building energy usage.

Great attention is paid to planning. The master planning process is underway and highly participatory with seven campus workshops completed, ten task forces in process, and a survey accurate base map in progress. The in-house efforts are saving more than \$1 million. Other significant projects include the Town Center Site Capacity Study, New Avent Ferry Building Space Study, Harrelson Closing Analysis, Western Blvd. Corridor Study, and Yarborough Drive Realignment Study, among others.

Major Facilities : The **Hunt Library** was one of the many transformational capital projects Facilities has accomplished. **Partners I and Research IV interior renovations**, Carmichael and

Camp Slocum improvements, Yarborough Chiller Plant, Lake Wheeler Dairy Milking Parlor, and the Burlington Nuclear Reactor Upgrade were a range of projects also completed in the fiscal year. Many projects are currently underway, including the Talley Student Center (Phase I slated completion Fall 2013), , Early, Lee Hall Renovation (Summer 2013),.

Facilities enhances experiential learning opportunities through internships and partnering with various academic units. The Office of the University Architect is directly involved with four department courses: Landscape Architecture, Architecture, Civil Engineering, and Horticulture Science. Facilities also partnered with Entomology and Plant Biology students for hands-on learning.

### **Goals**

Facilities will complete the Master Plan Update for May 2014 publication. The campus map on the NC State homepage will be improved as will utility maps of Centennial and Centennial Biomedical precincts.

Facilities will plan and advance a wide variety of strategies and projects. These include developing a University Fleet Management strategy, examining a complete on-campus composting program, completing the “tagging people to space” project with OIT, working on a fumehood replacement strategy, implementing the Energy Management Strategic Plan, developing the initial Smart Grid concept for Centennial Campus, performing building system re-commissioning with in-house teams to conserve energy, enhancing opportunities for student experiential learning through the “Pack Link” program, among many others.

The division will continue its leadership to manage capital projects at various stages, including but not limited to Centennial Campus student housing and dining, Talley Student Center addition and renovation, Poole Clubhouse, Gregg Museum, and Early College High School.

### **Finance and Resource Management**

The Finance and Resource Management (FRM) division ensures that the university upholds the highest standards of fiscal integrity, and this is evident in NC State receiving a clean audit for 2011-2012 and Associate Vice Chancellor Stephen Keto being award the first Fiscal Integrity Award by the Office of the State Controller. FRM has consistently implemented and maintained UNC-FIT KPIs on a timely basis and applied and updated other requirements, such as the new F&A rate which was implemented for campus July 1, 2012.

For enhanced service to campus, FRM has evaluated and improved efficiency and transparency in system and operational applications. In addition to Budget Central, the Finance and Business Dashboard is available to campus and maintained in a timely and accurate manner. Usability

and scope of data will continue to be improved. Phase I of the PI Portal went live on April 11, 2013 to provide a single location for PIs to access information for grant expenditures, personnel paid from project, equipment detail and project alerts (e.g., overdue technical reports which delay payment). Faculty recommended enhancements and services for Phase II are being collected. A final example is the implementation of the document management system to transmit document images instead of paper for travel reimbursement and p-card reconciliation processes for reduced workload and ease of workflow. The process was rolled out in February 2013 with a 93% adoption rate (i.e., transactions processed electronically versus paper-based).

### **Goals**

FRM's goals for the coming fiscal year include a "clean" audit with no major findings or recommendations; assisting in implementation of campus organizational changes, such as College of Sciences and DASA, regarding unit codes, transaction workflow and approvals; continue to build relationships with PIs and faculty and implement Phase II of the PI Portal and improve the TEARS application; begin preliminary work on the next F&A rate proposal; continue enhancing the Finance and Business Dashboard and be involved in Data Mart; continue reporting of UNC-FIT KPIs on a timely basis; improve efficiencies and evaluate upgrading to PeopleSoft 9.2 for better data accessibility; and get the Office of Cost Analysis fully operational.

### **Human Resources**

Human Resources (HR) has been a leader in meeting federal requirements and improving processes at NC State. When the federal requirement for annual reporting of employee data changed in 2013 to a new, 22-category Standard Occupational Code (SOC) structure, HR mapped the 6-digit federal SOC codes to the previous structure and subsequently shared and implemented for the entire UNC system via the UNC HR Data Mart. As a result, all 17 system institutions were able to avoid manually mapping all of their positions to SOC codes. NC State also offered the structure to the College and University Professional Association for HR (CUPA-HR) to share with its 1,900 members nationwide. CUPA-HR also recognized NC State's HR expertise by requesting that NC State nominate a staff member to serve as a representative and testify before a House Subcommittee in DC regarding the Legal Workforce Act.

HR's expertise has also been recognized at the state level. Based on demonstrated competencies and experience in job analysis, the Office of State Personnel granted HR delegated authority for 19 additional career bands, giving HR delegated authority for 99.7% of all SPA positions. NC State was also one of three agencies invited by the State to participate in a new pilot Unemployment case management system since proactive case management helped the university avoid \$919,000 in unemployment benefit claim liability in 2012-13.

HR implemented a major PeopleSoft implementation, achieving streamlined data entry, establishing defensible pay ranges for temporary staff, enhancing compliance, and automating many formerly manual processes. HR also implemented software to automate the state- and federally-mandated employment verification I9 process, resulting in greater efficiency, easier auditing, better data tracking, retention and retrieval systems.

HR provided campus clients with organizational design studies involving organizational structure and job design recommendations. Employee Relations conducted 10 facilitations and mediations to address workplace concerns and promote collaboration. They also managed the SPA RIF and EPA At-Will Discontinuation programs resulting in zero SPA grievances and EPA appeals being filed.

### **Goals**

HR will develop a business case for resources to develop a more robust global HR function to support the recruitment of international faculty and students to NC State, send more faculty and students abroad in temporary status, and employ faculty and staff in longer-term international environments. HR will propose and implement a strategic compensation philosophy for the University, expand Executive Search Services to Executive and Faculty Search Services, and consider a modified funding model for this service. HR will implement Affordable Care Act legislation and help the institution make strategic determinations regarding employees not currently covered by health care, additional employee classes and related migration, and technical system changes.

HR will also evaluate and streamline efforts through technology system enhancements and by providing consulting support for organizational design and development across campus. An organizational-learning strategic plan will be developed and include pilot implementation of the SkillSoft learning management system. HR will collaborate with the Office of General Counsel to enhance the Strategic Transformational Leadership Program for its second year.

### **Office of the Treasurer**

The Office of the Treasurer (OT) concentrated on ways to improve service across campus, with a special focus on students. WolfCopy increased access to printers across campus via students' AllCampus accounts, reduced the online service fee for funding the AllCampus account, and created a new "Follow Me" service, increasing convenience and enabling students to print in one location and pick up in another. The University Cashier's Office (UCO) upgraded SIS for enhanced student and parent self-service and automated removal of past due holds when payments are received. Students also receive returned payments faster with updates to the Nelnet/Quikpay system, which automatically reimburses student accounts versus the previous manual system. The UCO also implemented a new monthly payment plan for students using the



GI Bill and is on track to end the year with a 3.64% Perkins loan cohort rate – the lowest in three years. Lastly, the UCO created a Triage Unit to begin July 15, 2013 to reduce call wait time and improve customer service during peak periods of billing and payment inquiry.

Campus clients benefited via cost savings from the increase of multi-functional device usage, 7% Marketplace purchase orders and 12% PCard spend amount. OT established Leaders in Innovation and Nonwovens Commercialization, LLC to foster economic development by facilitating commercialization of technologies developed at the Nonwovens Institute. OT also provided assistance to the NC Agriculture Foundation (NCAF) regarding LaPaz, LLC, including the acquisition of closely held stock by another company resulting in the NCAF achieving a gain of more than \$13 million in the transaction.

For the benefit of the university-at-large, OT evaluated and implemented new financial standards. As of June 30, 2012, the NCSIF performed in the top quartile of the BNY Mellon College and University Endowments. In fiscal year 2013, the fund grew approximately 23% to a market value of \$488 million as of March 31, 2013, with a 10.4% fiscal year-to-date return versus the policy benchmark of 9.7%. Through various refinancing opportunities, the amount of debt service paid by all units with debt was reduced by 50 basis points resulting in major savings for colleges and student services. OT also secured a low cost line of credit, issuing \$274 million of new money and refunding bonds which resulted in a \$4.2 million net present value savings.

Planning is completed for a new Short-Term Investment Pool that can be used to pool investments for foundation operating cash and to address system-wide flexibility for investments of the university's trust funds. New investment in Blackrock's Liquid Policy Portfolio yielded a 9.8% return for seven months ending March 31, 2013. The Treasurer's Office changed the university's planned giving provider to Wells Fargo to improve potential returns and create enhanced reporting and donor interaction.

OT completed financing for the Talley Student Center and Centennial Campus Student Housing and closed the first Greek Village fraternity loan. Real Estate managed a reallocation of land with NCDA, administered more than \$9.5 million in annual rents, processed more than 30 easements, encroachments and rights of way, and implemented new delegated authority for leasing acquisition and disposition from the BOG.

### **Goals**

OT will establish a Short-Term Investment Pool, increase the adoption and use of Marketplace, continue to improve student communications and support, obtain construction financing for Carol Johnson Poole Clubhouse, update the 10 year capital borrowing plan, continue to expand delegation of authority for State property,

Kannapolis and Centennial Campus. To improve real estate portfolio analysis, OT will focus on local development and relocations.

OT will complete documentation of tax-exempt bond proceeds spending including State bonds. Then an RFP will be issued, a vendor selected and tracking software implemented. A data storage system for documents and private use calculations will be developed.

Other projects slated for the next fiscal year will be evaluating and financing of phytotron self-performed energy project using new legislation and available funds debt authority, potential internal loan projects for Gregg Museum and Creamery, and working more closely with affiliated entities for planning debt financing.

### **University Business Operations**

The strategic realignment of human resources and financial administrative services across campus achieved significant foundational accomplishments in the fiscal year. After evaluating the BORST recommendation, it was determined that all-in-one centers would be a less effective fit for NC State than functional shared service centers. After much analysis by the staff and Implementation Team, a formal recommendation for functional centers was made and approved in December 2012.

While that analysis was underway, work continued regarding identification of processes moving to the BOCs and strategies to streamline them via the HR and Finance Task Forces and subgroups. Physical locations, space requirements, IT needs, staffing needs and position identification for the centers were also identified.

In 2013 focus turned to implementation of the functional centers. A timeline was shared with campus and Onboarding, the first BOC, opened on target in May 2013. The phased approach with summer pilots allows for processes to be tested and improved prior to full campus roll-out in the fall. However, all campus will benefit from New Employee Orientation via the new Onboarding Center which began June 4, 2013.

Staffing is underway for the second center, Travel, as are location preparation, IT need fulfillment and other aspects of bringing the center live. The lift and shift staff transition process is essential to the Travel and other center operations, and the FTE requests have been sent to all Vice Chancellors and Deans as of May 31, 2013. Business officers and transition teams will be contacted in June 2013, and ScottMadden will be engaged to achieve a smooth transition process.

Communication has been a challenge for the BOCs, especially during the analysis process of center types when communication was deemed premature. Since the decision was made,

communication efforts have resumed with full force. University Communications has assisted, promoting BOC education via *The Bulletin*, presentations to different stakeholders, staff forums for potentially affected staff. The website has been streamlined to serve as a more effective communication tool and email communications will be implemented in the next fiscal year.

### **Goals**

The overarching goal for next fiscal year is to open six BOCs between October and June and extend Onboarding Center full services to all of campus in September 2013. In order to open the BOCs, UBOD will work with Transition Teams to achieve the lift and shift staff transition with assistance from ScottMadden to reallocate approximately 200 staff to the BOCs. Managers and central administrative staff, including a Communications Specialist, will be recruited.

Process redesign will continue until each BOC is brought live; however, UBOD will be committed to continual improvement after the BOCs are live. Procedures will be developed for tracking service requests, collecting performance data, and so on.

UBOD will create and administer a variety of training programs for new staff, staff remaining in colleges and units and campus-at-large so services can be effectively delivered and customers can effectively use the BOCs. UBOD will also create customer focus groups and business service liaisons. An annual customer satisfaction survey will also provide data for ways to improve training, processes and communication.

Communication will continue to be more frequent and specific with campus and targeted audiences. Vehicles will be Bulletin articles, website updates, focus groups and forums (as needed), emails, and through the LEAD group. Meetings will also be held with VCs, AVCs, Deans, Department Heads, and other groups to keep information current.

### ***By Special Initiative***

#### **Strategic Planning**

Finance and Business provides direct support to the university's Strategic Plan and has also worked to apply strategic plan initiatives at the division level so the Plan's objectives are meaningful to the daily work of staff at every level.

A few examples of direct support include FRM's assistance implementing changes in organizational unit codes, transaction workflow and approvals, and budget realignments. HR has provided expertise, strategies and support to search committees for Chancellor's Faculty Excellence interdisciplinary cluster hiring, and Facilities has managed 32 renovation projects in support of this initiative.

Working to integrate the Strategic Plan at the division level, Finance and Business engaged a consultant in July 2012 to assist with identifying top-tier Finance and Business initiatives in support of Strategic Plan initiatives. These were finalized in September 2012, and then owners were assigned for tracking and accountability. Next steps were to identify ownership of University-level initiatives and for divisions to self-identify key ways they could influence the success of the Strategic Plan, with the involvement of their respective subdivisions. These were combined into top-tier goals and initiatives for each division that would be actionable within the next three fiscal years.

### **Goals**

Clear plans must be created along with measurable outcomes. Next steps will be to establish metrics, engaging the Strategic Plan Implementation Team for feedback to ensure appropriate alignment with and interpretation of university-level efforts. Then the reporting structure for annual reports, assessment reports and strategic planning metrics will be evaluated and streamlined.

### **Enterprise Risk Management**

Enterprise Risk Management started at the university-level with top 10 risk identification. Finance and Business co-owns multiple risks and led the revision of its bowtie charts with the involvement of HR, Facilities and EHPS. In spring 2013, Finance and Business engaged Poole College of Management graduate students to identify the top-tier risks for its office and divisions. Students interviewed representatives from each division and surveyed leadership to rank risks. This work culminated in a final report in May 2013.

### **Goals**

As a next step and since many Finance and Business risks were linked with IT infrastructure, discussions will be held with OIT leadership in July 2013 to determine which risks should be culled from the Finance and Business top-tier risks list since they are owned by OIT. Finance and Business will then proceed with identifying its top 10 risks and developing bowtie charts to establish prevention and mitigation strategies.

### **Administrative Process Review Committee**

In the Administrative Process Review Committee's (APRC) second year, it has progressed beyond identification of pain points and has begun "myth-busting" communications to campus. The APRC has launched projects in the areas of F&A transparency, Facilities Modification, Transportation, Grantsmanship, Student Services, and APRC communications.

Each of these projects is in a different stage and supported by an assigned sub-committee. F&A transparency was a faculty concern appearing across many of the original pain points. The APRC worked with Finance and Business and the Office of Research to create a way to share F&A

information with campus so faculty better understand the process and understand that transparency does exist. Facilities Modification was a customer service and usability opportunity. The APRC surveyed clients to determine common challenges and recommendations for process improvements. After also completing ValueStream mapping with Facilities Modification staff, the APRC identified key strategies to innovate the process, recommending a Facilities Modification liaison to assist customers through the process and an enhanced website for greater ease of use and project status tracking. The liaison has been hired and started in May 2013. A baseline survey has been completed with a post-survey slated for 2014 to track effectiveness. The website will be revisited once the liaison has become established in his position and can lead this effort with APRC involvement.

Grantsmanship and Student Services are in the process improvement identification stage. Process owners have been identified, ValueStream mapping completed where relevant, and discussions held regarding customer perception and challenges. In each of these, some process improvements are underway by the process owners and are being understood and evaluated by the APRC. These projects will be continued in the next fiscal year, as will communications efforts. The new APRC website went live in April 2013 along with a process improvement recommendation input form. This will be the foundation for communication efforts in the upcoming fiscal year.

### **Goals**

The APRC is slated to conclude the Facilities Modification Process at the end of the next fiscal year, with the post-survey and website review. Continuation of engagement will be determined at that time but is not anticipated. Grantsmanship and Student Services will be the emphasis for the first half of the fiscal year. Recommendations will be developed for each and a plan of engagement with the APRC, if relevant. Work on Transportation visitor pass pain points recently began and will be revisited in the beginning of this fiscal year. Communication will be a major focus this year. The APRC website will be transitioned to a new environment and a communications plan will be established to myth-bust, raise awareness and encourage campus to become involved with offering recommendations for process improvements. To refresh pain point data, the APRC will work with University Planning and Analysis to discuss other existing data or a potential new survey. Lastly, the APRC will extend assistance to BOCs after they have been live for 90 days to assist with ongoing process improvements.

### **Budget Restructuring Task Force**

The Budget Restructuring Task Force (BRTF) was created in October 2012 for the strategic realignment of resources in support of the Strategic Plan. The BRTF has delved into the University's budget and related processes to determine if there is a way to better align resource

allocations on campus to the critical work of the strategic plan. Beginning by educating members regarding the current budget allocations and processes, the BRTF then engaged a consultant to provide an overview of budget models at peer institutions. In April 2013 the BRTF made timeline recommendations to achieve its charge, with the creation of a Data Support Team which launched in May 2013.

### **Goals**

The documentation of current budget processes will be completed by July 1, 2013. By August 15, 2013, the BRTF will provide a plan outlining how and when it will complete base budget allocation analysis. The BRTF's work will culminate in recommendations regarding whether NC State should alter its overall resource allocation model at the end of the next fiscal year.

### **Professional Development**

Staff leadership development is the objective of Leadership Retreats held by Finance and Business and instilled in every level of leadership within the office. It is encouraged on the individual and team levels. Some highlights include three staff completing the inaugural Strategic Transformational Leadership Program and Capital Project Management Project Managers and Supervisors achieving their LEED certification. [Insert Barb Carroll here?]

Each division identifies its best ways to enhance leadership develop and these efforts are shared at the Retreats or leadership meetings. Campus Enterprises initiated a semester-long pilot program for supervisors focusing on communication and leadership. Facilities also launched a pilot engaging Human Resources for a Leadership 360 pilot, which provided anonymous feedback to all 130 supervisors from their direct reports complemented with coaching for supervisors. This pilot gained national recognition by winning the APPA Innovative and Effective Practices Award.

### **Goals**

Staff professional and leadership development will continue to be a priority within Finance and Business. The Finance and Business Leadership Retreats will be evaluated for thematic structure and via an attendee survey to provide relevant and inspiring content. A potential retreat focusing on junior or second-layer leadership will be considered for a multi-tiered approach. In addition, divisional leadership development will be encouraged and highlighted at leadership staff meetings for knowledge and innovation sharing. Individual staff development will continue to be incorporated into one-on-one meetings with direct reports.