



UNIVERSITY of WASHINGTON

FY2024 Operating Budget Development Narrative Prompts

Central Finance

Section 1: Programmatic & Academic Vitality Narratives

*Text submitted within this section **will** be published to OPB's Annual Budget Development website*

Where possible, you are encouraged to leverage published materials already created

- 1) Please briefly summarize your unit's/campus's strategic plan and how your FY24 operating budget proposal (as submitted in Workday Adaptive Planning) connects to your campus/unit strategic plan. *Word Limit: 500*

UW Finance maintains a three-year business/strategic plan since FY22. The plan is updated annually. The plan is summarized at the Department level (below) and is "cascaded" to every unit within the Department. All departmental initiatives are grounded in unit level scorecards which are in turn linked to individual personnel annual performance objectives. The operational metrics (top portion of the scorecard) are linked to UW Finance's LEAN program, which has been recognized as a national leader in LEAN management (e.g. International SHINGO award). The Department tracks operational metrics at a detailed level and has a well-established continuous improvement program. The scorecard/strategic plan also has strategic initiatives, which are distinct projects managed outside the LEAN framework. These initiatives are tracked and updated regularly. The Strategic Plan is updated to align with UW wide initiatives/priorities, like UWFT and DEI work.

The FY24 Business Plan was the launching point for the department's budget and proposal. Workday Adaptive R1 incorporates these strategies and initiatives.

Last year, we identified over 25 new initiatives to complete by FY25. To date, we have completed the following 11 initiatives below and have added an additional 8 new FY24-FY25 strategic initiatives.

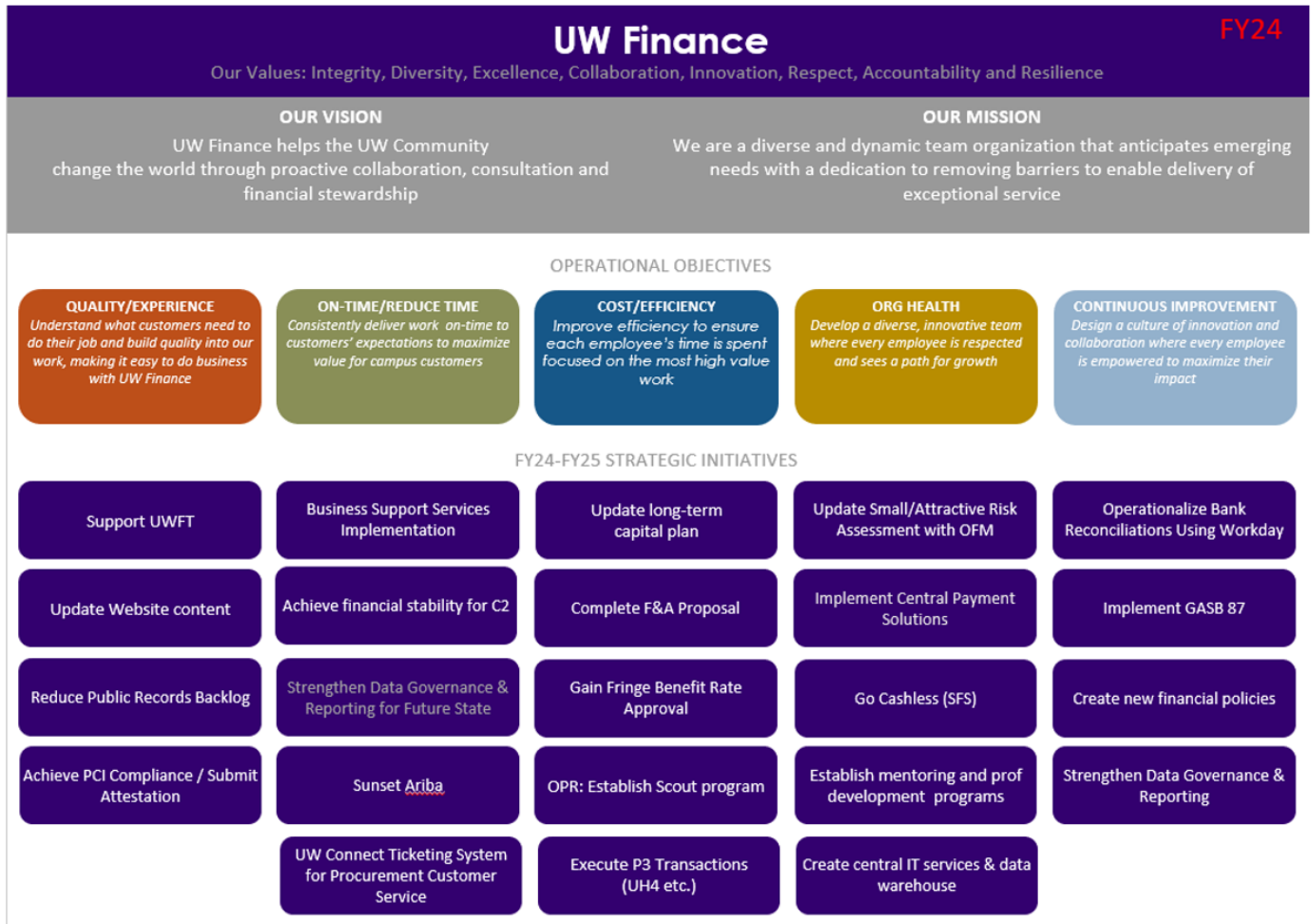
- Complete OPR Tech Refresh.
- Fetch the Future: Go Paperless (Records).
- Business Support Services Growth & Unrelated Business Income Tax (UBIT) Survey.
- Alternative Time Recording.
- Supplier Reduction.
- Sun setting Collection Relief, Liquidation, Perkins Port.
- Implement remote deposit across campus & central lockbox.
- Automate State Reporting in UW Workday.
- Implement Internal Controls Framework.
- Evolution of Housing Assistance Program (UHAP).
- Create a P3 Governance Structure (this is now complete and can be marked with a check)- have mark do that for you we retain a master copy.



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Every Finance unit is greatly impacted by the implementation and stabilization of UWFT. Supporting UWFT remains one of our primary strategic drivers. Our goal is to complete the critical work during this period while strengthening our organizational health and our commitment to diversity.

Not represented at the time the strategic plan was created is supporting the recent March 2023 ISC reorganization to UWIT and Central HR. Finance is committed to providing a smooth transition including continued administrative support throughout BI-21 and desktop/I.T. support throughout December 2023. ISC FY24 Adaptive forecasting resides under Finance cost-center/balancing unit and will shift to UWIT cost-center/balancing unit on go-live July 2023.



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- 2) Building on the responses your campus/unit submitted during the FY23 annual review cycle ([posted here](#)), how has your unit/campus integrated the themes and goals of [the 2022 – 2026 UW Diversity Blueprint](#) into your campus's/unit's ongoing work to take actions towards access, inclusion, and equity? *Word Limit: 750*

UW Finance is committed to building and supporting an environment that promotes and enhances diversity. In alignment with the UW's Diversity Blueprint, UW Finance has focused on three goals:

Goal 1 Cultivate an Inclusive Campus (Department) Climate

Campus Climate Survey and UW Finance Employee Engagement Survey.

UW Finance conducted employee engagement surveys in 2021 and 2022, including implicit and explicit diversity, equity, and inclusion (DEI) questions, which enables us to measure changes within departments and programs over time. In an ongoing effort, UW Finance is developing post-survey engagement activities that center around increasing equity and inclusivity.

DEI Training.

UW Finance has conducted preliminary mandatory department-wide training for employees with intensive training for supervisors and managers. These training increases manager awareness and accountability, including but not limited to:

- Information and Accountability
 - Examine implicit biases.
 - Action plan and commit to changes to create a culture of inclusivity.
 - Incorporate required training across the boards for managers to share a commitment to DEI, DEI goals embedded into annual Performance Evaluation.
- Tools and Resources
 - Develop the ability to engage in difficult and meaningful conversations.
 - Develop a mentor management style to support different learning and personality styles.
 - Create safe and inclusive environments for all staff.
 - Examine practices, policies, etc. to eliminate bias, remove barriers, and increase access.

Based on feedback we have received over the past two years, we will begin implementing DEI learnings into operations in the coming years. For FY24, UW Finance has developed individual and team goals:

- Individual
 - Attend UW Finance All Staff DEI training sessions and any required online learning/assessments/team discussions.
 - Actively participate in the employee engagement survey results and activities.
- Manager/Team
 - Set 1 short and 1 long term DEI SMART Goal and engage teams in discussions to meet goals.
 - Create and execute an action plan.

All new staff are now required to take required online DEI training as a part of onboarding

- Implicit Bias Training (UW Training).
- Skills for Inclusive Conversations (LinkedIn Learning).

This provides all incoming staff with core skills and creates common language in creating an inclusive environment.



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Additionally, all recruitments now and into the future require all applicants to answer at least one DEI question during the application process. Management positions, we required applicants to answer a question about creating an inclusive environment. These responses are evaluated as a part of the recruiting process by hiring managers.

GOAL 4 Attract and retain a diverse staff

- The Sr. Recruiter is be responsible for reviewing all UW Finance hiring practices, integrating new DEI practices, creating diverse pipelines, and collaborating with the DEI Lead to create and coordinate training opportunities
 - Create collaborations with for student pipelines for our entry level position
 - UW Tacoma's Milgard School of Business.
 - UW Foster School of Business.
 - UW Bothell School of Business.
 - iSchool Internship Program.
 - Community outreach: Engaging in community events that attract diverse populations.
 - Social Media: Actively reaching out and engaging with diverse groups and organizations to build diverse candidate pools.
- UW Finance will perform another comprehensive salary review to review salaries for equity within UW Finance with a lens toward DEI issues; do to this analysis and past analysis new hire salaries are now more in line and equitable.
- UW Finance created DEI communities such as book club and an intranet web resource team. Both teams are actively engaged in DEI discussions to raise awareness.

GOAL 6 Improve accountability and transparency

- UW Finance has implemented a DEI private-intranet page to provide information and resources to staff and is continually updating and refreshing the information.
- UW Finance Shared Services HR conducts exit interviews to determine to what degree culture plays a role in an employee's decision to leave the department, unit, or the UW.
 - Provides consolidated exit interview data and feedback to leadership, which is used to inform discussion and foster positive improvements as applicable.
 - Shared Services HR utilizes this feedback and data to coach and counsel supervisors and discuss engagement strategies with leadership.
- Procurement Services is committed to supplier diversity and works closely with Washington State's Office of Minority & Women's Business Enterprises (MWBE) to increase the list of diverse businesses that provide the provision of goods and services purchased by the University.