Office of Business and Finance

Bringing Our Vision to Life

Planning Workshop Report,
November 7, 2012
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Introduction

Dear Reader:

During the Fall of 2012, departments within Business and Finance met to evaluate and ensure that our strategic plan continues to align with the five strategic goals found in the University’s strategic plan. As a group, we met to share and celebrate the top five (5) strategic accomplishments that occurred during the past year within each department. It was inspiring and invigorating to review just a few of the accomplishments of the past year.

Our strategic plan is not merely words to be found on a page. Instead, it is a living document. For us, our daily actions and decisions are governed by the following vision:

- **Exceed expectations** as an integrated partner with campus and the community;
- **Shape Western’s culture** by embracing differences, pursuing equity, fostering human dignity, acting with integrity, and promoting personal development;
- **Positively impact life at the University** by being thought leaders and engaged members of the campus community.

We committed a significant amount of time and energy discussing how the Business and Finance vision will be brought to life. Our discussion was passionate, engaged, and thoughtful. The discourse was open and honest. We recognize that challenges exist which could limit our effectiveness in adhering to the plan. However, the benefits for doing so encourage us to continue to persevere in our efforts. Work has begun to develop strategies that will continue to bring the vision to life.

Business and Finance remains committed to our vision. It embodies the spirit of who we are and what we want to be. It is hoped that this report is useful to you in understanding the direction being taken by Business and Finance. The process is evolutionary and we continue to build on the foundation that has been laid so that we can continue to advance the University’s mission and vision.

Warmest regards,

Jan Van Der Kley

Vice President for Business and Finance
OBF Guiding Principles

Mission
The mission of the Office of Business and Finance is to provide leadership and stewardship over WMU’s fiscal, physical, and human capital so that all members of the University community can accomplish their learning, teaching, research and public service goals in safe, healthy, sustainable and attractive settings at reasonable costs.

August 2009

Vision
As the foundation that advances the University’s mission and vision, Business and Finance will:

- **Exceed expectations** as an integrated partner with campus and the community;
- **Shape Western’s culture** by embracing differences, pursuing equity, fostering human dignity, acting with integrity, and promoting personal development;
- **Positively impact life at the University** by being thought leaders and engaged members of the campus community.

January 2012

Core Values
As members of the Office of Business and Finance, we exemplify these values in everything we do:

- Wellness and Health
- Sustainability
- Diversity and Inclusion
- Ethics
- Respect
- Professionalism
- Equity

August 2009
Bringing the Vision to Life: Benefits and Strategies

The focus of the planning workshop was to identify potential benefits that may result from bringing the OBF vision to life and potential strategies for overcoming challenges that may impede progress. This section groups the top five benefits and strategies from each of the six workgroups into broader themes to support the creation of a visioning roadmap.

Top Vision Benefits

Participants identified a wide range of benefits for OBF employees that contribute to enhancing employee satisfaction and engagement. Operational benefits reflect a focus on results-driven and efficient performance. Direct customers of Business and Finance, as well and the University at large, are also viewed as benefiting from these efforts.

<table>
<thead>
<tr>
<th>Employees</th>
<th>Operations</th>
<th>Customers</th>
<th>University</th>
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</thead>
<tbody>
<tr>
<td>Happier/satisfied/confident/competent employees</td>
<td>Actually get to do the work we plan on doing. Improved results Operate more efficiently and effectively Organizational awareness/ synergy Planning ahead allows fine-tuning vision</td>
<td>Better customer service Better service Customer satisfaction Increased customer appreciation Retention, recruitment of students, customers &amp; staff</td>
<td>Greater university recognition/increased enrollment Higher student recruitment &amp; retention – i.e. - clean campus Improve WMU Reputation Increase enrollment/perception is reality Informed workforce &amp; customers More sales/Increase Revenue Enrollment Provide harmony for customers/employees/WMU Retention, recruitment of students, customers &amp; staff Support university mission</td>
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<tr>
<td>Highly engaged workforce</td>
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<tr>
<td>Hit your goals</td>
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<tr>
<td>Improved creativity and self-actualization</td>
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<td>Improved employee morale: Lower turnover/higher retention, Less stress &amp; frustration</td>
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<tr>
<td>Improved focus by all employees</td>
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<td>More efficient workforce</td>
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<tr>
<td>Positive Attitude/Empowerment</td>
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<tr>
<td>Reduce workplace conflicts</td>
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<td>Reduction in Stress</td>
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# Top Vision Strategies for Overcoming Challenges

The majority of the top strategies for overcoming challenges to bringing the vision to life focus on helping Business and Finance employees work smarter and more collaboratively through communication, recognition and training (separate theme). Operational strategies center on the deployment of technology, streamlining, and measurement.

<table>
<thead>
<tr>
<th>Employees</th>
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<tbody>
<tr>
<td>Being responsible: Empower them to take on responsibility, different strategies for different people, understand individual needs/wants</td>
</tr>
<tr>
<td>Build positive relationships</td>
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<tr>
<td>Communication</td>
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<tr>
<td>Developing formal recognition program</td>
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<tr>
<td>Employee interaction</td>
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<tr>
<td>Manage expectations</td>
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<tr>
<td>Naysayers: engagement &amp; buy-in: provide working example</td>
</tr>
<tr>
<td>No motivation: Articulate benefits of change, carrot &amp; stick approach, recognition</td>
</tr>
<tr>
<td>Not enough resources: Acknowledge it &amp; ask for solutions other than money &amp; people, think outside of box</td>
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<tr>
<td>Not team player: convey value as team member, place in team setting to show value</td>
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<tr>
<td>Recognition</td>
</tr>
<tr>
<td>Take the high road</td>
</tr>
<tr>
<td>Think outside of box for resources/ utilize students’ expertise</td>
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<tr>
<td>Top-down-(bottom-up) buy-in on all levels</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Operations</th>
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<tbody>
<tr>
<td>Better use of technology</td>
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<tr>
<td>Complexity of bargaining Unit environment: make it idea of bargaining unit, leadership buy in, commonalities of mgmt/B.U. objectives, highlight things we can agree on</td>
</tr>
<tr>
<td>Don’t do things we don’t need to do-streamline!</td>
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<tr>
<td>Focus on what we do best</td>
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<td>Looking for low hanging fruit</td>
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<tr>
<td>Measurement tools—before, during, after, ongoing</td>
</tr>
<tr>
<td>Prioritize IT projects / prioritize needs</td>
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<tr>
<td>Re-evaluate</td>
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<tr>
<td>Senior leadership direction and support</td>
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<tr>
<th>Training</th>
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<tbody>
<tr>
<td>Can’t think broadly: Educate to benefits, bring diverse groups together</td>
</tr>
<tr>
<td>Education and training</td>
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<tr>
<td>Job shadowing</td>
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<tr>
<td>Professional development</td>
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<tr>
<td>Regular and open communications (lunch and learns, ask for solutions)</td>
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<table>
<thead>
<tr>
<th>Customers</th>
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<tbody>
<tr>
<td>More focus on student-oriented customer service</td>
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<td>Engage employee feedback (360º where needed; customer surveys)</td>
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<tr>
<td>Staff development &amp; training (customer service training)</td>
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<tr>
<th>University</th>
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<tbody>
<tr>
<td>Increase our support of recruitment efforts</td>
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<tr>
<td>Utilizing campus resources</td>
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Top Five Accomplishments for 2012

At the workshop, each department presented their top five accomplishments for 2012. The lineup of successes was impressive. In addition, many participants commented that these presentations and updates provided an ideal forum for learning what other departments are doing.

The following pages show how through diligence and creativity OBF staff improved customer service, operational efficiencies, and campus safety in an environment of shrinking resources.

Accounting Services

1. Successful merger of accounts payable, procurement card, travel and payroll to a new payroll and Disbursements department, freeing University resources by reducing costs and improving efficiencies
   a. Eliminated two FTE.
   b. Process improvements including alignment of staffing cross training, campus training established and website restructuring.
   d. Added billing file uploads to eliminate voucher entry.
   e. Increase in WMU Today payroll announcements to employees.
   f. Increased coordination with HR communications to employees.
   g. Issued newsletters to business managers.
   h. Payroll Pay card implemented during FY 2072. Payroll checks reduced from 30,000 in 2011 to 600 in the first quarter of 2013.
   i. Enhanced tracking of invoices in a/p system using invoice received date.

2. Implemented tuition differential model with accounts receivable billing to improving financial position for the colleges of Business and Fine Arts, supporting superior customer service and efficient operations.
   a. Provided communication and training to the campus to assist with questions from students, parents, and staff.
3. Restructured the accounting and plant accounting offices, assisting customers to improve and complete their financial work more efficiently and effectively while maintaining compliance, and freeing up University resources.
   b. Decreased plant accounting reports.
   c. Added new financial reports and analyses for several areas including Auxiliary and DOSA.
   d. Added GLOW enhancements and website restructuring.
   e. Presented new and updated business processes at the business managers meeting.

4. Investment policy statement established for operating cash, improving the financial position for the University
   a. Approved July 2012 by the Board of Trustees. Increased return at a lower risk.

5. Improved tax compliance issues to free up University resources and improving efficiencies.
   a. Reduced non-compliant areas from 10 to 6 since December 2009.
Auxiliary Enterprises

1. Business Plans

This past year Business Plans were developed for all Auxiliary Enterprise areas – Bookstore Shops, Fetzer Center, Lawson, Miller Auditorium, The Oaklands, Pilot Plants and West Hills. These plans provide the framework for how to move forward in each area. Each area had the opportunity to take a look at their operations and explain who, what, when, where, how and why they are.

Within these plans areas touched upon the history of their business, reviewed their vision and mission statements and identified their business goals and objectives for the next several years. Products, services and marketing strategies were described. Each area did a SWOT analysis of their strengths, weaknesses, opportunities and threats. Finally action plans with key initiatives, actions items and implementation timelines were determined.

These plans will help facilitate expected changes in each business and provide a roadmap and a way to successfully achieve the laid out business goals and objectives. By putting these plans on paper it fosters additional commitment by all involved. These plans will be reviewed on a continually basis.

2. Acquisition and liquidation of University Bookstore –

During the past year the University purchased the University Bookstore. The WMU Bookstore shops operated it for a three month period as a stand-alone corporation. AE then proceeded to dissolve the corporation with the help of Accounting and Julie Carroll - AE could not have done it without them. AE then proceeded to liquidation and merge the operation with the WMU Bookstore shops. Since the merge, AE has restructured the operation and positioned the Bookstore for success going forward.

3. Year-end Balances

This past year end AE areas combined ended the year in the black. The WMU Bookstore shops ended the year slightly negative after a transfer to cover some of the purchase cost of the University Bookstore.
4. Drupal

AE has moved forward with moving their web sites into Drupal – content management system. The biggest benefit of doing that is that it is starting to set the stage for the following:

1. For department to manage their own edits to the site through a workflow process.
2. Being able to set sun rise (when items need to be made live) and sun set dates (when they need to come down) from the site automatically.
3. The movement to responsive design so that the site adapts to the end-users device whether it is a computer, iPad or mobile phone.
4. Quickly changing the look and feel of a site through the application of themes.
5. Preparing AE to move into the multi-site format of the WMU CMS when University Relations is ready to incorporate our departments.

5. Rafters Book Rental

Partnering with Rafters (an online book rental service) continued to allow the Bookstore to rent many titles in store and increased the Bookstore’s book rentals sales from $80,000 the previous Fall to $400,000 this past Fall. The students were able to take advantage of lower cost and the Bookstore still recouped (for in-store sales) the entire in-store book price from Rafters.
Business Services

Music President

Continue to serve as MUSIC President, developing 5 year strategic plan, working at making MUSIC more inclusive by getting more members involved and participating to ensure succession is in place going forward. Led RFP for claims adjuster which saved $$ on Administrative expenses. Do various presentations to BOT, Business and Legal Officers, and at Conferences.

Risk Assessment

Worked with Aon and Carol Sundberg to identify potential coverage gaps, best RM practices, and ways of reducing exposures and liabilities to WMU. This was accomplished by reviewing structure, processes, and procedures of the Unified Clinics.

Property Management

Working to stabilize tenant and revenue flow at Howard St Plaza by expanding and arranging space for current and future tenants.

Loss Control/Safety

Fund, approve, and monitor safety projects on campus, including fire alarm upgrades at Rood/Everett, roof and chiller access, and Behavior based safety programs. Continue to stay involved with MUSIC committees with planning symposiums and webinars in order to provide loss control/safety education options to university staff.

Contract Management

Work with the General Counsel's Office, Purchasing, and AVP for Business and Finance to identify and implement improvements in the flow and process for contracts.
Central Office

**School of Medicine Implementation** (Financial Plan, Facility Plan, Financing Plan)

**Provide leadership** and also committee members for the University Strategic Tactical Advisory Committees (TACs)

**Delivering efficiencies** for financial sustainability (various headcount reductions, merge payroll/payables, automated manual processes)

**Improved** Contract Review Process – drive initiator ownership and more customer centric

**Provided leadership** on economic issues during union negotiations
Community Outreach

**Continued development of the BTR Park.** Now or soon will be home to 40 companies. New 40,000 sf facility to be built for mophie to be global tech support and quality control headquarters and distribution/logistics center for North America. Lynx Systems is building new network operating headquarters in the F&V Tech Center. Four companies have been added to the Innovation Center; Arcadia Supplements, Anisyn Inc, MLC Research and Tetra Discovery. Companies in the BTR Park do research with faculty, offer student internships, hold adjunct faculty positions.

**Expanded leadership role** with the Greater Kalamazoo Chamber of Commerce on the Futures Committee as part of the search for a new president/CEO. President Dunn has asked that as a member of the Chamber Board, I represent the university in these initiatives.

**As a Director of the Downtown Development Authority and Downtown Tomorrow, Inc.** represented WMU as a broker for discussions between the D’s and the City of Kalamazoo as these organizations go through a major transition.

Was instrumental in helping the City of Kalamazoo obtain Federal NSP funding for the demolition of the Northwest Unit. Represented W M U in discussions with various neighborhoods for this project as well as the Noble Lodge razing.

Continue to represent the university in on-going discussions with potential external partner KDC, Inc. for the possible redevelopment and adaptive reuse of the buildings on East Campus.
Facilities Management

Landscape: Deploying Beet Juice for Deicing

- 115 average complaints/year before implementation
- 33 average complaints/year after implementation
- Environmentally Friendly
- Lowers Deicing Cost
- Begins Deicing Process Immediately
- Prevents Black Ice
- Reduces Complaints

Custodial: Specialty Team Cleaning Concept

- Productivity Gain:

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<th>Schneider</th>
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<tr>
<td>Before</td>
<td>8.3 FTE</td>
<td>6.0 FTE</td>
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<tr>
<td>After</td>
<td>6.5 FTE</td>
<td>6.0 FTE (with an increase of 20,000 sq ft)</td>
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</table>

- High Performance Cleaning Management System
- Standardized Tools and Cleaning Procedures
- Each Worker Trained on Specialized Tasks
- Safer, Cleaner, and Healthier Work Environment

Power Plant: Employee Cross Training and Apprenticeship Program

- Reduced plant staff from 27 to 15
- Avoided over $800,000 from in-house maintenance
- Increased Labor Efficiencies
- Reduced Maintenance Cost through Employee/Contractor Partnership
- Improved Plant Safety with Intensive Training
- Reduced Down Time Due to Cross Training
Maintenance: Work Order Process Improvement

- Shorten Work Order Cycle Time from 15 to 10 days
- Priorities for Residence Halls/Classrooms
- Auto Response to Requestor
- Paperless Work Orders
- Customer Service Survey

Projects/Construction: Classroom and Public Space Condition Analysis

- Overall classroom condition rating increased from 4.1 (of 5.0) in 2008 to 4.5 in 2012
- Annual Condition Analysis of Classrooms and Public Spaces
- Utilize Students to Objectively Judge the Condition of Spaces
- Strategically Selecting Improvements to Spaces
Human Resources

Employee/Labor Relations

- Settlement of AFSCME Contract
- New Professional Development Programs Including “How Western Works” and the Supervisory Training Series

Compliance

- I9 Audit/Process Improvements
- Implementation of Federal Healthcare Mandates
- MPSERS Systems/Benefits Change Communications

Total Compensation

- Implementation of Special Pay Programs
- New Wellness Program Development/Implementation
- Communications of Self-Insured Healthcare Plans Systems
- Revisions to Retirement, Annual Leave, and Healthcare Plans

Projects

- Hiring/Provisioning Process Improvements
- New Employee Orientation
- Staff Compensation System
- Videography of AFSCME Jobs

Campus/Community Commitment: Team Participation

- Implementation of University Strategic Plan
- Integrated Marketing Team
- University “Brand Champions” Project Team
- Annual Diversity Event
- University Learning Communities
Logistical Services

Maintenance Stores Inventory

- Have eliminated over $108,000 of obsolete inventory. Will continue to work with Facilities Management to further identify and delete obsolete items. Also improved screening process for adding items to warehouse inventory.
- Working with Facilities Management to promote products in warehouse starting with a trade expo held this past summer. This event will now be held on a yearly basis. We hope to continue with lunch & learn sessions, shop meetings, special events, etc. As a result – warehouse sales have increased by 10.5% as compared to the previous year.
- Investigating “just in time” product delivery opportunities. Also investigating vendor-owned inventory possibilities.

File Transfer Protocol (FTP) Site

- Site on Logistical/Purchasing website nearing completion for downloading bid specifications and uploading bid responses. Security issues still need to be worked out.

Cross Training

- Employees in the Mail, Receiving & Distribution area have been cross trained to enable staff to maintain customer service levels due to absences, heavy workloads, emergencies, etc.
- Have also cross trained between Purchasing and Maintenance Stores staff on a limited basis.

Mail Services Improvements

- By survey for mail services distributed to key campus customers.

Surplus Sales Improvements

- Scrap metal is now sorted down by metal category (brass, copper, etc.) to increase redemptions.
- Utilizing Facebook and PublicSurplus.com and participation in Bronco Bash, Fall Welcome among other campus events have increased campus and community interest in Surplus Sales.
Public Safety

- Increase crime prevention programs on drug and alcohol use, giving student the tools they need to successfully transition to and remain at WMU.
  - Committed Officer Andrew Bachmann to community policing full-time in April.

- Research, analyze, and recommend a new emergency notification system that includes text messaging.
  - The end result: the RFP review committee approved Rave Alert in October. Contract is being reviewed.

- **Provide DPS instructors to other in-services training organizations** in order to offer more specialized training to DPS staff at a lower cost.
  - Officer Andy Bachmann was donated to the Southwest Michigan Training Consortium as a driving instructor for nearly three weeks allowing six of our officers to attend performance driving classes.

- **Expand T2 parking software** to allow orientation families access to online permits.
  - Options within T2 were expanded
  - Online Permits were available for orientation families
  - Park Mobile was deployed to allow Pay-By-Phone use of parking areas

- **Design and facilitate a function disaster exercise** with full-scale components.
  - The disaster exercise has been designed and will be held on Nov. 30.
Report from the Trenches: How BC&SS brought their vision to life

Building Custodial and Support Services (BC&SS) embarked on their vision journey in spring 2011 by creating the department’s first vision and a strategic action plan to achieve this vision.

During the November 7, 2012 Bringing Our Vision to Life workshop, AVP Pete Strazdas, Director Steve Gilsdorf, and supervisors Nate Stonerock and Bill Jones shared how this journey initiated a cultural shift with wide-reaching impact within the department and throughout campus.

Initially, BC&SS followed the same path as other Business and Finance departments: The leadership team under then-director Shelley Grant develop a bold vision and identified strategies for achieving it. When current BC&SS director Steve Gilsdorf came on board, he wholeheartedly embraced the vision and provided the support necessary to implement the strategies.

Measurement of incremental progress is setting the stage for continuous improvement. Internal performance data and customer feedback information is displayed on large boards in prominent locations so all BC&SS staff can view the progress in which they play a vital role. Weekly supervisor meetings and monthly training sessions foster discussions on strategy implementation, professional development, and the vetting of new initiatives.

Key elements of bringing the BC&SS vision to life include internal and customer surveys, training workshops, and customer-focused service and cleaning programs. An important driver behind each of these initiatives is the implementation of positive reinforcement and its science-based approach of building and sustaining those behaviors that drive performance excellence.
Cultural Shift
Facilities Management
Building Custodial Support Services Unit

Cultural Shift Timeline

- Preliminary Adjustment Stage
  - Zone Team Cleaning
  - RECSPO Reorg.
- Baseline Organization Analysis
  - Steve Gilchrist starts as director
  - 360° Survey for Leadership Team
- Implementing Cultural Changes
  - Attendance Study & Pilot Program
  - WECARE

Key Events:

- 2004-2005
  - Zone Team Cleaning
  - RECSPO Reorg.
- 2006
  - Custodial Staffing Adjustments
  - Sustainable Custodial Practices CHS Bldg.
- 2008
  - Custodial Division Visioning
- 2010
  - Building Coordinator Survey
  - Personal & Professional Development Series
  - Specialty Cleaning Concept
- 2011
  - Winter 2011: Custodial Division Visioning
  - Summer 2011: Building Coordinator Survey
  - Winter 2012: Personal & Professional Development Series
  - Summer 2012: Specialty Cleaning Concept
- 2013
  - Winter 2012: Personal & Professional Development Series
  - Summer 2013: Specialty Cleaning Concept
BC&SS Mission

- To provide a clean and safe environment for students, faculty, staff and visitors while maintaining facilities at the highest standard possible with the resources allotted.

BC&SS Vision

- To provide the highest level of customer service satisfaction of any campus across the state of Michigan by being innovative, flexible, and competitive with a can-do attitude.
Cultural Shift -
Implementation of Positive Reinforcement

Positive reinforcement is a consequence which increases behavior

Requirements:
- Specific
- Timely
- Contingent
- Consistent

Applications:
- Creating Culture of Positive Reinforcement
- Customer Feedback: Applausometer, Kudos Board
- Building Coordinator Survey
- Attendance Recognition Program

Cultural Shift -
Creating a Positive Reinforcement Culture

Areas of focus:
- Continuous Improvement: PDCA Cycle
- Discussion of “Sandwich” or “Yes, but” method
-Oops by Aubrey Daniels
- “Going the extra mile” (discretionary effort)
Cultural Shift - “Going the extra mile”

- Initiative developed in Visioning Workshop
- Shutting down ideas
- Only tasks on task sheets
- Increase in ownership of making ideas & plans
- Serving the customer
  - Valuing and responding to customer requests
- BC&SS reputation improves
  - Employees receive more and more compliments from university community

Applausometer

Keep it up! Good job! Great job! Wonderful! Superb!

APPLAUSE-O-METER
Kudos Board

Cultural Shift – Baseline Date
Building Coordinator Survey

• **Goal:**
  – Understanding to which extent customers are satisfied with the services provided by WMU custodians

• Sent out to 51 Building Coordinators \( \rightarrow \) 53% response rate

• 17 Questions to rate on a scale of 1 (poor) to 4 (excellent).
Cultural Shift – Baseline Data
Building Coordinator Survey

- **Staff qualities**
  - helpfulness,
  - Promptness
  - friendliness
  → almost perfect score of 3.7 - 3.8
- **Building cleanliness** received ratings of 3.0 - 3.4

- All but 1 item received rating of ‘good’ or better

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360 Survey Results
WMU Bldg. Custodial
MLPI 360 Feedback Results

**GROUP/MLPI Results - Strengths & Opportunities - Frequency**

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<tr>
<th>MLPI Factors</th>
<th>Strengths</th>
<th>Opportunities</th>
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<tr>
<td>Management Practices</td>
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<tr>
<td>A. Goal Setting</td>
<td>23</td>
<td>10</td>
</tr>
<tr>
<td>B. Planning &amp; Organizing</td>
<td>29</td>
<td>8</td>
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<tr>
<td>C. Technical Expertise</td>
<td>9</td>
<td>23</td>
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<tr>
<td>D. Performance Standards</td>
<td>10</td>
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<tr>
<td>E. Coaching</td>
<td>17</td>
<td>12</td>
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<tr>
<td>F. Evaluating Performance</td>
<td>32</td>
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<tr>
<td>G. Facilitating Change</td>
<td>21</td>
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<td>H. Delegation</td>
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<td>I. Recognition</td>
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<td>Leadership Practices</td>
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<td>M. Strategy</td>
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<td>N. Communication</td>
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<td>O. Teamwork</td>
<td>23</td>
<td>16</td>
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<td>P. Empowering Employees</td>
<td>22</td>
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<td>Q. Trust</td>
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<td>25</td>
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<td>R. Resourcefulness</td>
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<td>15</td>
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<td>S. Self-Confidence</td>
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<td>23</td>
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<td>T. Decisiveness</td>
<td>21</td>
<td>8</td>
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Personal & Professional Development Series

- Monthly meeting-topics:
  - Framework: feedback rules, definition of supervisor role
  - Technical expertise
  - Delegation
  - Trust
  - Communication
  - Self Confidence
  - Performance Standards

Attendance Recognition Program

Graphic Feedback

- Weekly Graph with absenteeism of crew for the last 6 weeks

<table>
<thead>
<tr>
<th>Absenteeism of Zone H for the past 6 weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Graph showing absenteeism trends]</td>
</tr>
</tbody>
</table>

Praise (Positive Reinforcement)

- Weekly praise meetings
  - Announcement of employees with perfect attendance in the past week
    - Plus continuous weeks
    - Praise certificate

![Certificate of recognition]
Overall Percentage of Absenteeism per week

Specialty Team Cleaning

- High Performance Cleaning Management System
- Standardized Tools and Cleaning Procedures
- Each Worker Trained on Specialized Tasks
- Results in Safer, Cleaner, and Healthier Work Environment
Specialty Team Cleaning

By the numbers:

<table>
<thead>
<tr>
<th></th>
<th>Schneider</th>
<th>* Sangren</th>
</tr>
</thead>
<tbody>
<tr>
<td>Was</td>
<td>8.3 FTE</td>
<td>6.0 FTE</td>
</tr>
<tr>
<td>Now</td>
<td>6.5 FTE</td>
<td>6.0 FTE</td>
</tr>
</tbody>
</table>

*with an increase of 20,000 sq. ft.

Where are we going next?

- Facilities Management **WECARE** Program
- Launch January 2013
  - Defining expectations for FM and the customer
  - Education and expectations
  - Measuring results (deliverables)
- Taking the best of each division
  - Adding new processes/procedures
  - Customized branding program for better customer recognition and employee ownership
Breakout Session Outcomes

The focus point of the Workshop consisted of a breakout session with four planning activities. Six breakout groups explored different aspects of bringing the Business and Finance vision to life.

Imagine the OBF vision has come to life

A vision is not just a nice-sounding statement of what might be. It is a beacon which inspires the work of everyone in the organization. The first step in that journey is to imagine the world where the vision is reality. Groups brainstormed what they would do differently every day if they lived the OBF vision in every interaction with each other and with the other members of the WMU community.

Think benefits

Because of what members of the overall OBF team will do differently when the vision is alive, they and others around them will benefit. Gradually, the culture changes as desired new behaviors are reinforced. Participants discussed the possible benefits of bringing the OBF vision to life may be in store for their departments, their customers, and WMU in general.

Identify challenges and obstacles

A vision-driven culture does not happen. It has to be created. This is hard work. There are roadblocks and detours that make achieving the vision more challenging. If changes are not apparent, or if early successes are not celebrated, then the momentum may subside and things go back to the old normal, except that there will be the added frustration of failure. In this activity, groups identified potential challenges and obstacles to bringing the OBF vision to life.

Prioritize clear strategies

The great thing about challenges and obstacles is that they can be overcome. Among other things, this will take ingenuity, creativity, and an entrepreneurial customer focus. Participants explored and prioritized possible strategies for overcoming potential challenges and obstacles.
## Activity 1: Imagine the OBF vision has come to life

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
<th>Group 5</th>
<th>Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cross Training Depts./ Related Areas</td>
<td>Identity expectations with customer</td>
<td>Freedom to be more proactive</td>
<td>Time to interact with others.</td>
<td>Asking questions, clarifying expectations to be sure we are not doing unnecessary work</td>
<td>Listen (intently) to our customers everyday (active listening)</td>
</tr>
<tr>
<td>Follow thru with customer with time frame on responding to customer</td>
<td>Create benchmarks with customer</td>
<td>Provide ownership and buy in</td>
<td>Quiet time to organize your day.</td>
<td>Sharing expectation/ transparency</td>
<td>Practice verbal judo (putting yourself in their shoes- “golden rule”)</td>
</tr>
<tr>
<td>Cross departmental communication</td>
<td>Get feedback/ buy-in from customer</td>
<td>Delegate more</td>
<td>Empower people to handle issues without passing them on.</td>
<td>Benefits= employees feel pride &amp; appreciation, ownership</td>
<td>Continuous learning</td>
</tr>
<tr>
<td>Synchronize across division</td>
<td>Be creative- “think out of box”</td>
<td>Plan further ahead</td>
<td>Communicate to others processes and procedures.</td>
<td>Improved interaction skills in working and responding w/ others (employees &amp; customers)</td>
<td>Be engaging as leaders- participate!</td>
</tr>
<tr>
<td>Who is the customer-</td>
<td>Who is the customer-</td>
<td>Use of employee feedback</td>
<td>Quit fostering unrealistic expectations.</td>
<td>Customer has what they need to make good decisions (see benefits chart)</td>
<td>Collaborate on solutions</td>
</tr>
<tr>
<td>• Bldg. coordinator</td>
<td>• Bldg. coordinator</td>
<td></td>
<td></td>
<td>Investigate/ educate employees to know how to help/ respond before sending customers or other employee elsewhere</td>
<td></td>
</tr>
<tr>
<td>How to exceed expectations</td>
<td>How to exceed expectations</td>
<td></td>
<td></td>
<td>Reaching out to customers to see if they have what need/ help determine what it is</td>
<td></td>
</tr>
<tr>
<td>• Measure – publish disseminate metrics and results</td>
<td>• Measure – publish disseminate metrics and results</td>
<td></td>
<td></td>
<td>Ask if they are getting service they expect</td>
<td></td>
</tr>
</tbody>
</table>
Activity 2: Think benefits

**Top Five Benefits**

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
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<th>Group 5</th>
<th>Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Greater university recognition/ increased enrollment</td>
<td>2. Increased customer appreciation</td>
<td>2. Reduction in Stress</td>
<td>2. Actually get to do the work we plan on doing.</td>
<td>2. Improved results</td>
<td>2. Increase enrollment/ perception is reality</td>
</tr>
<tr>
<td>6. Operate more efficiently and effectively</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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</tbody>
</table>
### Additional Benefits

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 3</th>
<th>Group 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better customer service</td>
<td>Increase Sales</td>
<td>Focused services</td>
</tr>
<tr>
<td>Happier employees</td>
<td>Positive attitude toward work</td>
<td>Improved results</td>
</tr>
<tr>
<td>Operate more efficiently</td>
<td>Reduce stress</td>
<td>Long term impact/ culture change</td>
</tr>
<tr>
<td>Increase enrollment</td>
<td>Improve WMU Reputation- students, employee, and community</td>
<td>Increased customers/ more students!</td>
</tr>
<tr>
<td>Organizational awareness</td>
<td>Planning ahead allows fine-tuning vision</td>
<td>Continued improvement</td>
</tr>
<tr>
<td>Synergy</td>
<td>Empowerment via employee feedback</td>
<td>Better stewardship</td>
</tr>
<tr>
<td>Greater recognition for the university</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Activity 3: Identify challenges and obstacles

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
<th>Group 5</th>
<th>Group 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breaking down silos</td>
<td>Naysayers</td>
<td>Opposition to change</td>
<td>What’s in it for me?</td>
<td>Lack of automation</td>
<td>Resources (physical/ people/ $)</td>
</tr>
<tr>
<td>Lack of trust</td>
<td>People being too self focused- not team players</td>
<td>Available Resources</td>
<td>Other people’s agendas impose on you.</td>
<td>Lack of IT resources</td>
<td>Culture shift</td>
</tr>
<tr>
<td>Resistance to change</td>
<td>No motivation to change</td>
<td>Financial</td>
<td>Keeping the momentum going.</td>
<td>Limited resources $ &amp; people</td>
<td>Competition- external- other universities</td>
</tr>
<tr>
<td>Tradition= always done it this way</td>
<td>Does not want to be responsible</td>
<td>Time</td>
<td>Managing change.</td>
<td>Lack of/ limited buy in</td>
<td>Training- (professional development) for employees</td>
</tr>
<tr>
<td>Time commitment</td>
<td></td>
<td>Staffing/ Skills</td>
<td>No priorities set</td>
<td>Maintaining momentum</td>
<td>Lack of buy-in at all levels</td>
</tr>
<tr>
<td>Commitment, lack of follow thru</td>
<td></td>
<td>Training</td>
<td>Not staying current in</td>
<td>Staff turnover</td>
<td></td>
</tr>
<tr>
<td>Naysayers</td>
<td></td>
<td>Status Quo</td>
<td>expertise &amp; trends.</td>
<td>Uncontrollable factors- economy</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fear</td>
<td>Diversity in the number of</td>
<td>Limited financial recognition</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Support- Management/Divisional Accountability- Unified both ways</td>
<td>departments, hard to find common ground.</td>
<td>Different priorities/ by different areas “silo” each WMU area</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>How do we prepare ourselves to spread the word to others- no skill set.</td>
<td>Different philosophies</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Lack of willingness to accept or participate</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(motivation not there)</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Sabotage</td>
<td></td>
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</tbody>
</table>
Activity 4: Prioritize clear strategies

Top Five Strategies for Overcoming Challenges

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
</tr>
</thead>
</table>
| Focus on what we do best  
Regular and open communications  
(lunch and learns, ask for solutions)  
Job shadowing  
Measurement tools- before, during, after, ongoing  
Senior leadership direction and support synergy | Naysayers: engagement & buy-in: provide working example  
Not team player: convey value as team member, place in team setting to show value  
No motivation: Articulate benefits of change, carrot & stick approach, recognition  
Being responsible: Empower them to take on responsibility, different strategies for different people, understand individual needs/wants  
Can’t think broadly: Educate to benefits, bring diverse groups together  
Not enough resources: Acknowledge it & ask for solutions other than money & people, think outside of box  
Complexity of bargaining  
Unit environment: make it idea of barg. unit, leadership buy in, commonalities of mgmt/ B.U. objectives, highlight things we can agree on | Communication  
Education and training  
Recognition  
Utilizing campus resources  
Employee interaction |

<table>
<thead>
<tr>
<th>Group 4</th>
<th>Group 5</th>
<th>Group 6</th>
</tr>
</thead>
</table>
| Manage expectations.  
Professional development  
Build positive relationships  
Take the high road  
Looking for low hanging fruit | Prioritize IT projects / prioritize needs  
Staff development & training (customer service training)  
Engage employee feedback (360° where needed; customer surveys)  
Developing formal recognition program  
Re-evaluate | Don’t do things we don’t need to do- streamline!  
Think outside of box for resources/ utilize students’ expertise  
More focus on student-oriented customer service  
Top-down-(bottom-up) buy-in on all levels  
Increase our support of recruitment efforts  
Better use of technology |
## Additional Strategies

<table>
<thead>
<tr>
<th>Group 1</th>
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<th>Group 4</th>
<th>Group 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific feedback and reinforcement</td>
<td>Reorganization</td>
<td>Sharing praises</td>
<td>Identify leaders/ work with</td>
</tr>
<tr>
<td>Emphasis the positive</td>
<td>Education/ Training</td>
<td>Empowerment with accountability</td>
<td>Incorporate to daily life- for long</td>
</tr>
<tr>
<td></td>
<td>Employee Interaction</td>
<td>Resolving issues sooner and at a</td>
<td>term strategy</td>
</tr>
<tr>
<td></td>
<td>Communication-open-two way</td>
<td>lower level- empowerment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recognition</td>
<td>Communicating and sharing of</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Within campus community-</td>
<td>information</td>
<td></td>
</tr>
<tr>
<td>Academic</td>
<td>Leaving available systems</td>
<td>Chunking it down – challenges</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Communication</td>
<td>Understanding your customer base</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trade-co-sponsorship</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Documentation</td>
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</table>
Next Steps

The visioning workshop marked the second step in the Business and Finance visioning journey. Step one occurred in January of 2012 when OBF leadership and staff created OBF’s first vision.

This report outlines the benefits Business and Finance may anticipate as the result of implementing the vision. Some benefits are readily realizable while others require additional training and operational improvements.

The strategies explored by participants of the November 7, 2012, visioning workshop will be reviewed by a visioning team. This team, with support from staff throughout the OBF, will develop and deploy an implementation roadmap built around these strategies.

Plans are already underway to reconvene the larger group at the end of 2013 to review the first results of the visioning journey.
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