Fiscal Year 2014 Priorities
Business Services – Business Management

Shared Core Values, Expected Leadership Behaviors and Specific Expectations for ALL Business Management Staff:

1. **Customer Valued Quality Service** – anticipate, meet and facilitate the needs of the University community by providing timely, professional, and knowledgeable service.
   - Create value for your customers and partners; a successful DFA/Business Manager is viewed as a valuable member of the leadership team in the unit while providing a robust control environment
   - Present a creative, positive and solution-oriented “face of Business Services”

Specific examples surrounding the **Customer Valued Quality Service** values, behaviors and expectations include:

- Be available, receptive and approachable
- Be an enthusiastic and positive participant in departmental, Business Services or University activities
- Don’t just attend; provide input, ideas, feedback and accurate information
- Add value by compiling and presenting only the most relevant data to your customers in a compelling and creative way
- Listen; you have to listen to understand needs and be able to come up with solutions
- Be a creative thinker to solve problems and to come up with creative solutions
- Consider all constraints when considering solutions; this includes financial, political, policy and guideline restraints
- Anticipate needs; be proactive; don’t wait for the Dean/Head/Business Services Leaders to bring things to you
- Keep everyone informed; consider your constituents and how changes will impact them
- Be open to change; embrace and fully learn new systems, processes and policies so you are able to provide top quality service

2. **Financial Stewardship and Accountability** - manage the University’s resources responsibly, effectively, and efficiently with personal accountability and ethical conduct.
   - Know and communicate your unit’s financial health
   - Actively manage unspent funds and accounts with deficits; find new ways to “move the needle”
   - Provision proper controls with the spirit of protecting the resources and reputation of the unit (this is an attribute of customer valued quality service, NOT a policing exercise)

Specific examples surrounding the **Financial Stewardship and Accountability** values, behaviors and expectations include:

- Executive summary (dashboard)
- Reconcile base budget
- Base budget projection: share with the appropriate individuals
- Unspent fund accounts: Manage, share what’s available and plan to spend

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- Report on accounts and share with the appropriate individuals; know what is available, how the sources can be used differently and communicate recommendations
- Projections for all sources with commitments against them
- Long term projection for college
- Communicate/review accounts with the appropriate individuals
- Signature delegation: Understand; allowable, allocability (who is department’s responsible individual) and reasonableness of expenditures
- Target efforts on a problem; plan, execute and follow through
- Ethical conduct: Process to elevate
- Create/manage proper controls (i.e. credit cards, understanding signature delegation, cash handling, and segregation/separation of duties)

3. **Continuous Improvement** - continually assess and proactively seek innovative ways to add value and improve operations and services.
   - Add value to process improvement initiatives (travel, procurement, electronic time keeping, business intelligence, etc.); champion the change to our customers, and contribute to continuous improvement and support of the new process
   - Streamline and standardize processes when appropriate; share across the organization

Specific examples surrounding the *Continuous Improvement* values, behaviors and expectations include:
- Name Subject Matter Resource Facilitators (SMRF’s)
- Liaisons to central areas
- Communicate with customers (tips and tricks)
- One-on-one attention
- Share lessons learned (i.e. Concur); different sessions, different responses – “find the truth”
- Utilize DFA and Cluster meetings for sharing and presenting new ideas and training
- Develop relationships so the Business Management area is pulled in early in the process for feedback and help
- Insert yourself when possible
- Good customer service begets continuous improvement – our customers will come to us for assistance
- Learn from each other
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4. **Collaboration** - promote an environment with customers and colleagues that includes listening, learning, and the flexibility and willingness to consider creative solutions, and that seeks an acceptable level of risk to achieve opportunities and common goals.
   - When you see an opportunity to improve, explore it with your supervisor and colleagues; develop and share the idea
   - Positively and proactively contribute to team efforts; help expand the number of contributors from Business Management

Specific examples surrounding the **Collaboration** values, behaviors and expectations include:
- Identify as the "liaison" that serves as the link between central offices and policies to the academic/administrative units to provide "Customer Valued Quality Service"
- Confirm Subject Matter Resource Facilitators and Liaisons join together to collaborate on new projects, process improvement and general awareness
- Join with faculty focus groups to receive feedback on business challenges (i.e. research post award management)
- Ensure a visible and active presence on Leadership Teams within the unit
- Attend and fully participate in college level subject matter group meetings
- Promote by rewarding the behavior (i.e. Bravo Awards)
- Standing topic on Cluster Agendas that allows for presentation of new ideas and then determine a further sharing mechanism
- Encourage "grass roots" meetings between staff that perform specific subjects (outside of college centric meetings)
- Disseminate innovative tools to business challenges (bravo award nominations for this)
- Recognize tools that are part of a larger solution; share them
- Create an environment where everyone feels comfortable in sharing ideas

5. **Professional Growth and Development** - provide an environment where staff members are actively mentored and encouraged to grow professionally and personally, are recognized for their achievements, and are given opportunities with greater exposure and responsibility.
   - Ensure that every member of the business office has a common set of knowledge (Foundation of Excellence); fully implement this new tool
   - Provide every staff member in Business Management the opportunity for training and professional development

Specific examples surrounding the **Professional Growth and Development** values, behaviors and expectations include:
- Ensure all new Business Managers have a common first year experience
  - Develop website with links, etc.
  - Clearly identify training coordinator group as the owner of process (Cindy Davis)
  - Implement a training plan for all new hires in conjunction with this tool
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- Cross-train in areas within the department/school/college
  - Provide staff with the opportunity for training and professional development
    - Discuss opportunities regularly (staff meetings)
    - Create awareness of funding opportunities
    - Utilize the Training Coordinator Team as a resource
    - Take advantage of webinars and one-day sessions – these type of opportunities are typically low-cost and provide networking opportunities as well as professional development
    - Include all levels (i.e. account assistants with supervisor responsibilities)

6. **Respect and Diversity** - foster an inclusive community where all points of view and experience are valued and all people are treated with respect and courtesy.
   - Know and contribute through your personal action to the Business Management Diversity Plan
   - Make forward progress in your personal diversity journey

Specific examples surrounding the **Respect and Diversity** values, behaviors and expectations include:

- IDI Assessment – expand to more people. Do individual one-on-one assessments with the business manager group. Do a general presentation to account clerks, etc.
- Continue the Diversity Point-To-Ponder agenda item to start off the DFA meetings with all DFA’s having an opportunity to take a turn.
- Expand the Diversity Point-To-Ponder to be a regular agenda item at the Cluster meetings if that is not already being done.
- Add a diversity component to the New Employee Orientation (NEO) if feasible or add it to the Business Management orientation.
- Promote the ACIREMA program (offered through the University Residences Directors Office) that gives a look at what an international student has to go through to get to Purdue.
- Take advantage of any similar offerings across the University if available.
- Continue to utilize CNI (Cornerstone Networking Initiative) to foster interactions that then lead to respect and a more diverse outlook.
- Model behavior – lead by example in your area.
- Buddy system – buddy up with a person outside your area. Match newer people with more experienced people (mentoring). Perhaps buddy up with central office personnel.
- Establish a simple way for business management to recognize central business offices for the good positive things they do.
- Grad Student Payroll Orientation – another annual opportunity to experience diversity and incorporate it into our business processes.
7. **Staff Development/Supervision** - to what degree does this person 1) ensures that developmental plans are properly established and implemented 2) works with staff to set realistic goals linked to most current University strategic plan 3) establishes realistic stretch goals and monitors the quality of work reinforcing individual accomplishments 4) finds creative ways to reward team successes and 5) deals with issues amongst direct reports firmly and in a timely manner not allowing issues to linger.