

**F&A Strategic Plan  
Action Plans  
Two Tier Retreat, January 2005**

	Internal Partnership	External Partnership	Business Reengineering	Optimize Resources	Common to All Strategies
<b>POTENTIAL F&amp;A KEY INITIATIVES</b>	<p>Outreach Program:</p> <ul style="list-style-type: none"> <li>• Customer feedback mechanism</li> <li>• Customer education, training</li> <li>• Improved partnerships</li> <li>• Puddle-stomping, personal contact</li> </ul> <p>WEB presence and updates</p> <p>Leverage and use the Skills Database for F&amp;A staff</p> <p>Training</p> <ul style="list-style-type: none"> <li>• Train for staff in building effective relationships</li> <li>• Identify training needs (within and across departments)</li> </ul> <p>Teamwork and teambuilding (within and across departments)</p> <p>Ensure all stakeholders are represented and participate in projects and other activities</p>	<p>Create a database of external entities, relationships, and points of contact</p> <p>Leverage multimedia technology to collaborate with external partners more effectively and frequently</p> <p>Develop, promote, and mentor multiple UCAR contacts for external partners</p> <p>Promote staff participation in professional organizations, meetings, and conferences</p>	<p>Broaden the scope of current reengineering efforts; evaluate and consider paper and labor-intensive processes, among and within departments</p> <ul style="list-style-type: none"> <li>• Workflows</li> <li>• Duplication of duties</li> <li>• Eliminate unnecessary routines</li> </ul> <p>Identify and apply new and existing tools and automation to improve our efficiencies through reengineering efforts</p>	<p>Leverage new and existing technology to the best of our ability</p> <p>Identify and develop training and cross-training opportunities</p> <ul style="list-style-type: none"> <li>• Use skills database and share knowledge and resources based on that information</li> </ul> <p>Develop plan for pooling resources</p> <p>Adapt performance appraisals (goal setting), and rewards systems to support F&amp;A initiatives</p> <p>Encourage customers to use the full-extent and capability of our services to reduce dependence on F&amp;A staff</p>	<p>F&amp;A Priorities</p> <ul style="list-style-type: none"> <li>• Reevaluate high-level priorities and resources required to support all of the activities that we're doing</li> </ul> <p>Metrics</p>

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<b>Business Services</b>  <b>Office of General Counsel</b>  <b>Treasury Operations</b>	<ul style="list-style-type: none"> <li>Survey customers re: satisfaction, id a liaison, work issues</li> <li>Outreach: Education and training for users, roundtables, newsletters, bldg, etc.</li> <li>Teambuilding exercises for F&amp;A internal to BS and F&amp;A Wide</li> </ul>	<ul style="list-style-type: none"> <li>ID Organizations and people</li> <li>Internal experts → outreach</li> <li>Regulatory tracking</li> <li>Leadership in FFRDC, professional organizations, etc.</li> <li>Succession plan</li> </ul>	<ul style="list-style-type: none"> <li>Bi-Tech Reengineering: “REQ to CHK” and Contract Management Module (CMM)</li> <li>Reengineer how procedures are disseminated to customers</li> <li>BS cross-training</li> <li>Technology automation</li> </ul>	<ul style="list-style-type: none"> <li>Manage customer relationships and partnerships, brownbag, letters, alias, feedback</li> <li>Training/cross-training/mentoring</li> <li>Using technology and effective procedures</li> </ul>
<b>Office of General Counsel</b>	<ul style="list-style-type: none"> <li>Get out more</li> <li>Satellite Office(s)</li> <li>Participate in customer events</li> <li>Seminars, brown bags, put-on and attend</li> </ul>	Included in Business Services		
<b>Physical Plant Services</b>	<ul style="list-style-type: none"> <li>Advertise our expertise</li> <li>Assign facilities liaison to each division</li> <li>Simplify response procedures (web based)</li> <li>Prepare plan for quick identification of contractor warranty issues</li> <li>Create skills database</li> <li>Encourage training on advanced systems</li> </ul>	<ul style="list-style-type: none"> <li>Identify relationships</li> <li>Review relationships and resolve issues</li> <li>Reorganize/streamline construction project management</li> <li>Streamline plan review time to include affected PPS staff</li> <li>Clarify roles of all PPS personnel in large projects; Increase scope to include general building issues</li> </ul>	<ul style="list-style-type: none"> <li>Staff:facilities ratio and associated training</li> <li>Improved relations: within the maintenance/construction process</li> <li>Update website to allow for better Work Order tracking</li> <li>Use tools effectively (MAXIMO)</li> <li>Tie BPR changes to customer partnerships; don't mess it up</li> </ul>	<ul style="list-style-type: none"> <li>Improve Maintenance access to AutoCad drawings</li> <li>Incorporate “as-builts” as priority into Work Order system</li> <li>Maximo optimization</li> <li>Enforce a tool policy</li> </ul>

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<b>Budget and Finance</b>	<ul style="list-style-type: none"> <li>• Staff dev/training for users critical areas</li> <li>• Add staff to skills database</li> <li>• BF open house</li> <li>• Teambuilding BF/F&amp;A</li> <li>• BF take staff dev classes</li> <li>• F&amp;A web page</li> <li>• Employee at orientation</li> </ul>	<ul style="list-style-type: none"> <li>• Database</li> <li>• NSF website training</li> <li>• Education and awareness</li> <li>• Succession planning for Katy and Jeff regarding federal government contacts</li> <li>• Professional org/newsletters, etc.</li> <li>• Strong controls = good audits</li> <li>• Training and education (i.e. auditors)</li> </ul>	<ul style="list-style-type: none"> <li>• Update web / outdated info.</li> <li>• Leverage technology - apps and systems</li> <li>• Eliminate unnecessary routines</li> <li>• Suggestion box</li> <li>• Tie to annual review goals</li> <li>• Training</li> </ul>	<ul style="list-style-type: none"> <li>• Plan/prioritize needs and services based on input</li> <li>• Cross-train (within B&amp;F and among F&amp;A)</li> <li>• Share/pool resources</li> <li>• Develop staff in new competencies</li> <li>• Recognize and reward innovation</li> <li>• Measurements</li> <li>• Meet demand without new costs</li> </ul>
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>• Newsletter, brownbag, etc.</li> <li>• More personal contact rather than electronic</li> <li>• Reevaluate use of satellite office</li> <li>• Creative outreach, most important to customers/partner for staff development</li> <li>• Post implementation reviews on special projects</li> <li>• Design participation agreements w/ management of each lab</li> <li>• Advertise organizational development services</li> <li>• Coordinate all training through Staff Development</li> </ul>	<ul style="list-style-type: none"> <li>• Membership in professional organizations</li> <li>• Identify NSF and other peer groups (CU, NOA) and exchange information/best practices</li> <li>• Get educated on NSF &amp; other funding organization's strategies &amp; processes</li> <li>• Comparisons/benchmarks with other organizations</li> </ul>	<ul style="list-style-type: none"> <li>• HR assist with all reengineering projects</li> <li>• Solicit feedback on how to do job better, brown bags, etc.</li> <li>• HRIS</li> <li>• Share more info on reengineering to-date</li> <li>• Reevaluate current HR processes—check for duplication of effort, efficiency of forms.</li> </ul>	<ul style="list-style-type: none"> <li>• Initiate innovative programs</li> <li>• Maximize use of new HRIS</li> <li>• Provide seminars to educate, i.e. via EAP</li> <li>• Use project management models</li> <li>• Develop a workforce planning tool</li> <li>• Develop performance appraisal standards based on competency models</li> </ul>

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<b>Safety &amp; Site Services</b>	<ul style="list-style-type: none"> <li>• Define Customer</li> <li>• Dialogues (Focus, information sessions, brown bags, articles, publications, brochures)</li> <li>• Communicate</li> <li>• Identify training needs</li> <li>• Train customers – reduce single points of failure</li> <li>• Web updates</li> <li>• Training needs in building effective relationships</li> <li>• Survey users</li> <li>• New technology (for Logistics)</li> <li>• Define customer interaction points, needs based services</li> <li>• UMC visibility</li> <li>• Share accomplishments</li> <li>• Monthly management reports</li> </ul>	<ul style="list-style-type: none"> <li>• GSA vehicles</li> <li>• Vehicle support</li> <li>• Identify external partners (health department, vendors, and lots of others)</li> <li>• Tradeshows</li> <li>• Use local expertise</li> <li>• Use students *</li> </ul>	<ul style="list-style-type: none"> <li>• Reengineer: RRS, black bag, alcohol, card access</li> <li>• New technology areas</li> <li>• Survey committees for possible reengineering candidates</li> <li>• Schedule time out of office</li> <li>• Improve project management (i.e. security projects)</li> </ul>	

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<b>Information Technology</b>	<ul style="list-style-type: none"> <li>• Customer participation, focus groups and assessments</li> <li>• Presentation, education, tours, road shows, newsletters, and surveys</li> <li>• Challenge F&amp;A management to set priorities!</li> <li>• Develop Service Level Agreements (SLAs)</li> <li>• IT Strategic plan</li> <li>• Cross training within IT and among departments</li> <li>• Leverage collaborative technologies</li> <li>• Escalation and support project (helpdesk)</li> <li>• Website current/updated</li> <li>• Philosophical: face-to-face, out more, proactive, etc. (increase onsite presence and interaction)</li> </ul>	<ul style="list-style-type: none"> <li>• Identify Contacts/Organizations (Complete)</li> <li>• Create contacts “rolodex”</li> <li>• Prioritize and work relationships</li> <li>• Encourage professional certifications, prioritize per SME</li> <li>• Identify mentoring needs</li> <li>• Collaborate to see where MM tech helps</li> <li>• <del>Identify sources for lice, sec, regulatory issues</del></li> <li>• Identify roles and succession plans</li> <li>• Reward and recognition plan (tie to F&amp;A Developing staff initiative)</li> <li>• <del>Communication plan re: meeting needs</del></li> <li>• Effective communication training (tie to F&amp;A Developing Staff Initiative)</li> </ul> <p style="text-align: center; color: green;">Updated per ITMGT meeting 6/15/05</p>	<ul style="list-style-type: none"> <li>• Review IT process, select process, look for best practices</li> <li>• Metrics for resources in projects/baseline</li> <li>• Capacity planning model</li> <li>• Centralized knowledge base/tools</li> <li>• ID resources needed for reengineering projects and prioritize efforts</li> <li>• Invite users into monthly meetings</li> <li>• Cross function IT teams to review enhancements</li> <li>• Survey customers</li> <li>• Common repository</li> <li>• Communication plan on reengineering projects</li> <li>• Challenges assumptions industry best practices</li> </ul>	<ul style="list-style-type: none"> <li>• Train users to do more</li> <li>• Training</li> <li>• Cross training</li> <li>• Identify critical functions</li> <li>• Metrics to identify problem areas</li> <li>• Strategic roadmaps for technology</li> <li>• SLAs</li> <li>• Streamline &amp; improve efficiencies in processes and projects</li> <li>• Showcase and leverage current technology (including APIs)</li> <li>• Leverage vendor support to outsource specified tasks</li> <li>• Collaborate internally</li> <li>• Share resources with in IT and with other IT/FA groups</li> <li>• IT staff dedicated to work with customers</li> <li>• Complete Project Office/web update</li> <li>• Capacity planning model</li> </ul>