

Administration & Finance Strategic Plan

2022 - 2026



May 30, 2022



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Letter from the Senior Vice President and Chief Business and Finance Officer



Calendar years 2020 and 2021 had an indelible impact on our Administration and Finance (A&F) team members. We learned how resilient we are as individuals and as a collective group. Through it all, A&F continued to support our university community as the operational backbone, whether from on campus or teleworking. Priorities changed, and out of necessity, we became more innovative and committed to delivering services in new ways. As dedicated to the university as we are, we also learned the importance of placing more emphasis on our own well-being, both physical and mental. Armed with rededication to service excellence, a spirit of smart risk taking, empowered by our own resiliency, we launched the A&F FY 2022-2026 Strategic Planning Process.

I am immensely proud of the communal effort by which the strategic plan was developed and this final report. In our strategic plan, we challenged ourselves to bring the UMB core values and the A&F Guiding Principles to life. Our guiding principles are composed of the four UMB Core Values sets, and an additional value set of service excellence and accountability that provides the foundation for our day-to-day interactions. We like to say we became WISER with the development of our Guiding Principles.

Well-being and Sustainability

Innovation and Discovery

Service Excellence and Accountability

Equity and Justice

Respect and Integrity

We dared ourselves, using our combined talents, to go after ambitious goals that will help UMB fulfill the desired outcomes related to the six UMB strategic plan themes of 1) Accountability and Integration of Core Values 2) Student Growth and Success 3) University Culture, Engagement, and Belonging 4) Innovation and Reimagination 5) Community Partnership and Collaboration and 6) Global Engagement and Education. We reflected on our strengths and acknowledged our weaknesses, allowing us to focus on outcomes where we could be most impactful. You will find more than 50 outcome-related goals that we seek to accomplish in the next four years. Completing the strategic plan was a satisfying accomplishment. We know and accept that we have set a course for ourselves that will require tremendous yet targeted efforts.

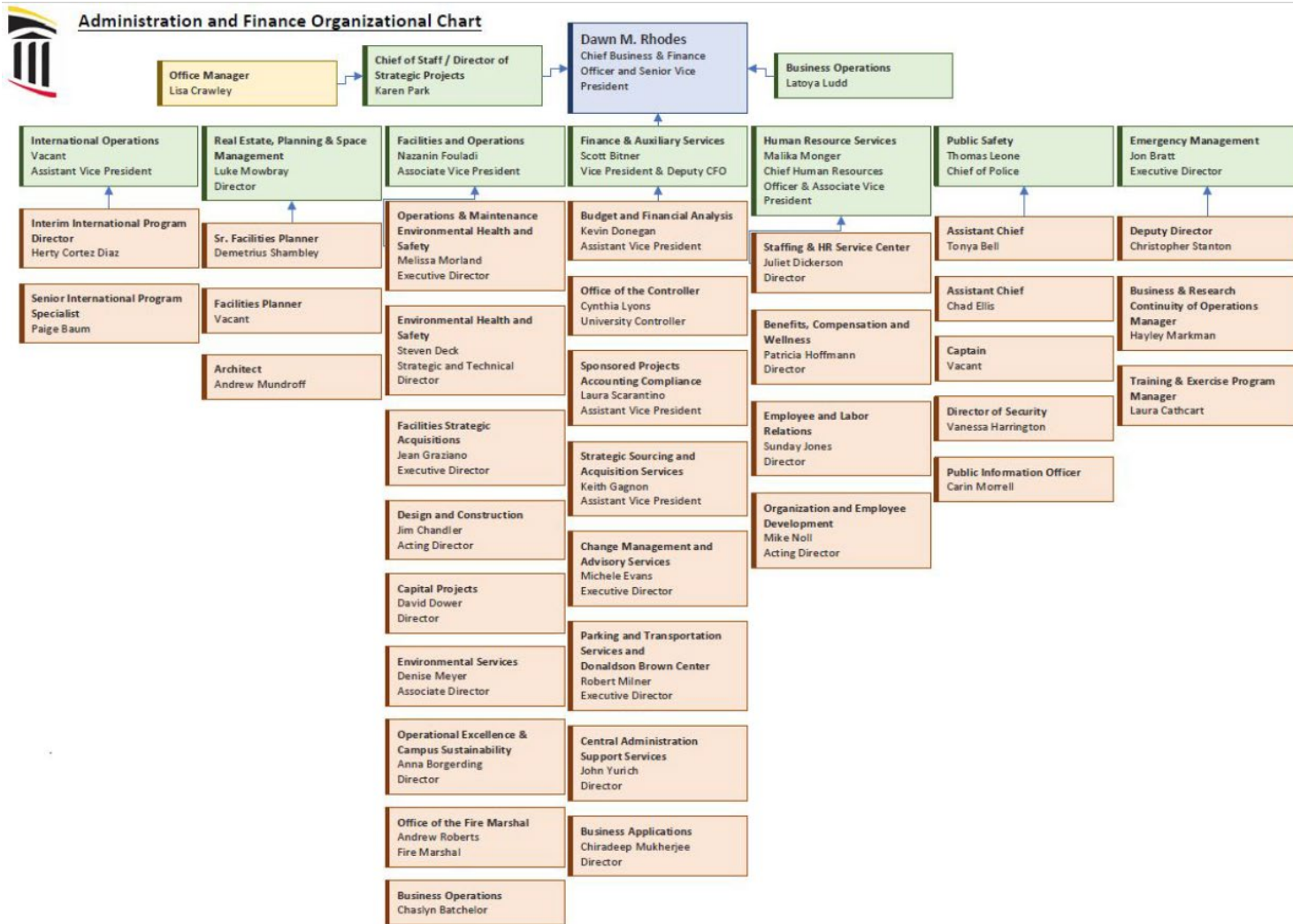
I close by saying I truly enjoy my service as the Senior Vice President for Administration and Finance. My passion is ignited every day in some way. I am awed by the team of A&F. In our respective departments, we accomplish monumental amounts of work each year. We have opportunities for improvement, and we do not shy away from that fact. I take joy in knowing that I am joined by others in A&F that are dedicated to the UMB campus community and who seek to foster partnerships, delivering outstanding service and innovative business solutions one interaction at a time.

Respectfully,

Dawn M. Rhodes, DBA

Senior Vice President, Administration and Finance and
Chief Business and Finance Officer

Administration and Finance Organizational Chart



Revised: June 1, 2022

Strategic Plan Participants

Over 80 participants engaged in at least one of the 8 strategic planning meetings.

Office of the Senior Vice President (OSVP)

Lisa Crawley, Office Manager

Latoya Ludd, Business Operations Manager

Karen Park, Chief of Staff and Director of Strategic Projects

Dawn Rhodes, Senior Vice President and Chief Business and Finance Officer

International Operations (IO; formerly Maryland Global Initiatives Corporation, MGIC)

Paige Baum, International Program Senior Specialist

Herty Cortez-Diaz, International Program Manager

Jennifer Flinn, Executive Director

Real Estate, Planning, and Space Management (REPSM)

Luke Mowbray, Director

Demetrius Shambley, Senior Facilities Planner

Facilities and Operations (F&O)

Chaslyn Batchelor, Senior Facilities and Operations Specialist

Jim Bolton, Acting Director Occupational Health & Safety Training

Anna Borgerding, Director of Operational Excellence & Sustainability

Angela Boxley, Associate Director Risk Management

Jim Chandler, Acting Director Design & Construction

Steve Deck, Strategic and Technical Director Environmental Health & Safety

David Dower, Director Capital Projects

Matthew Fischer, Assistant Director & Biosafety Officer

Nazanin Fouladi, Associate Vice President Facilities and Operations

Jean Graziano, Executive Director Facilities Strategic Acquisitions

Kathy Hastings, Assistant Director Design & Construction

Mike Krone, Assistant Director Utilities Operations & Maintenance

Denise Meyer, Associate Director Environmental Services

Mickey Miller, Senior Project Manager Capital Projects

Melissa Morland, Acting Exec Director Operations Maintenance, Environmental Health & Safety

Terry Morse, Executive Director Design & Construction

Lucas Noppenberger, Assistant Director Trades Operations & Maintenance

Priya Prasad, Associate Director Capital Projects

Andrew Roberts, Fire Marshal

Kevin Smith, Associate Director Mechanical Systems

Reese Spindle, Assistant Director, Maintenance & Administration Support

Michelle Stezelberger, Senior Lead Commissioning Inspection Manager

Marquitta Weems, Assistant Director Environmental Services

Finance and Auxiliary Services (F&AS)

Muhammad Bilal, Accounting Assistant Director
Scott Bitner, Vice President and Deputy Chief Business and Finance Officer
Candace Chow, PRS Assistant Controller Financial Services
Kevin Cook, Director Sponsored Projects Accounting & Compliance
Kevin Donegan, Assistant Vice President Budget & Finance
Michele Evans, Executive Director Change Management & Advisory Services
Andrew Flerlage, Senior Financial Analyst Budget & Finance
Keith Gagnon, Assistant Vice President Strategic Sourcing & Acquisition Services
Mary Beth Gallico, Business & Quality Improvement Analyst
Tony Green, Manager TDM and Transportation Services
Lynell Griffin, DB Director, Disbursements
Angela Hall, Director, Transportation and Parking Services
John Jensen, Assistant Vice President Administration Services
Cynthia Lyons, University Controller & Assistant Vice President
Alice Maxwell, Assistant Director Accounting
Susan McKechnie, Assistant Vice President Finance & Controller
Robert Milner, Executive Director Parking & Transportation Services
Barbara Moser, Associate Director Strategic Sourcing & Acquisition Services
Chiradeep Mukherjee, Director Financial Systems
Sheri Myers, Director Financial Services General Accounting
Glosenda Navales, Assistant Director Accounting
Tracy Ngo, Senior Analyst Budget & Financial Analysis
Jordan Nixon, Bursar & Assistant Controller Student Accounting
Laura Scarantino, Assistant Vice President Sponsored Projects Accounting & Compliance
Brian Simmons, Assistant Director Parking & Communications
Regina Spencer, Assistant Director Business Development Programs
Michele Ward, Director Sponsored Projects Accounting & Compliance
John Yurich, Director Central Administration Support Services
Alex Zouras-Wieneke, Director Change Management & Advisory Services

Human Resource Services (HRS)

Sheila Blackshear, Diversity, ADA & AA Administrator
Jamaica Cosby, Director Special Projects
Juliet Dickerson, Interim Chief Human Resources Officer, Associate Vice President
Mark Emmel, Director, Organization Employee & Development
Karla Evans, Human Resources Manager
Janice Flair, Administrative Manager
Patricia Hoffmann, Director, Benefits Compensation & Wellness
Sunday Jones, Director Employee & Labor Relations
Mike Noll, Acting Director Organization & Employee Development
Yaw Tweneboah-Koduah, Manager Human Resources Information Systems

Department of Public Safety (PS)

- Tonya Bell**, Assistant Chief of Police
- Chad Ellis**, Assistant Chief of Police
- Christopher Finn**, Lieutenant
- Tyrell Fleming**, Lieutenant
- Duane Harrington**, Lieutenant
- Vanessa Harrington**, Director of Security & Compliance
- Matthew Johnson**, Lieutenant
- Jason Kunz**, Lieutenant
- Thomas Leone**, Chief of Police
- Carin Morrell**, Public Information Officer
- Todd Ring**, Lieutenant
- Dennis Smith**, Lieutenant

Office of Emergency Management (OEM)

- Jonathan Bratt**, Executive Director
- Laura Cathcart**, Program Manager Training & Exercise
- Hayley Markman**, Operations Manager
- Chris Stanton**, Director



Caption: A UMB Police Officer talks with some students outside the SMC Campus Center.

Administration and Finance – Mission and Vision Statements

MISSION - To deliver exceptional service to the University community through professionalism, stewardship, and leadership, one interaction at a time.

VISION - A team of diverse and motivated professionals fostering partnerships, delivering outstanding service, and innovative business solutions one interaction at a time.

Administration and Finance – Guiding Principles

W - Well-Being and Sustainability: I will ensure that I am a good steward of resources by promoting the health and well-being of myself, society, and the environment. I want to meet the needs of the present without compromising the future.

I - Innovation and Discovery: I will learn, adapt, and reimagine processes that will drive creative change. I will take prudent risks to continuously discover more effective and efficient solutions to meet university goals. I am committed to communication and collaboration to break down silos.

S - Service Excellence and Accountability: I will provide reliable and professional services to meet the needs of our University community. I will embrace a solutions-oriented approach one customer interaction at a time. I will take ownership of my mistakes and their implications.

E - Equity and Justice: I will strive to foster a culture of inclusiveness, diversity, and fairness. I am committed to growing my knowledge of inequities and injustices. I will support equitable opportunities across our community.

R - Respect and Integrity: I will treat everyone in a dignified and civil manner. I will listen to, value, and consider the opinions of others. I will strive to do the right thing, even in the face of adversity.

Administration and Finance 2022-2026 Strategic Plan Goals

*Note: These correspond to the UMB Strategic Outcomes listed on Page 16.
Fifty-seven (57) goals were assigned to sixteen strategic outcomes.*

Theme 1: Accountability and Integration of Core Values

Strategic Outcome 1 Goals:

- Have direct reports and colleagues evaluate A&F leaders, with management responsibility and above, on their demonstration of operationalizing the Guiding Principles as evidenced in their day-to-day behaviors. (OSVP)
- Change Management and Advisory Services (CMAS) will incorporate core values language and behavioral expectations into reviews and communications to demonstrate our commitment to accountability. [F&AS]

Strategic Outcome 2 Goals:

- Define the Guiding Principles and associated behaviors and ensure these are implemented throughout A&F. Identify a communication plan and division-wide activities that will prioritize these behaviors. (OSVP)
- Develop and implement a comprehensive safety-training program for laboratory managers and research coordinators. (F&O)

Strategic Outcome 3 Goals:

- Every "leader" will operationalize the Guiding Principles in a written plan. Every "leader" will implement these plans and be held accountable to these plans. (OSVP)
- Create internal guidelines for department to serve as a compass for guiding the staff in performing their duties. (F&AS)
- The International Operations department will recruit personnel that historically exemplify the guiding principles. (IO)
- Implement annual training and development programs that address departmental and organizational training objectives, ensuring integration of UMB's core values. (HRS)

Theme 3: University Culture, Engagement, and Belonging

Strategic Outcome 1 Goals:

- Real Estate, Planning, and Space Management (REPSM) will interview and collect input from every School and administrative unit to develop the Facilities Master Plan and determine capital project priorities. (REPSM)
- CMAS will further develop the Change Management Network to serve as a representative and collaborative resource for informing Quantum (Financials/HR) system end users and gathering their feedback on overall system improvements. (F&AS)
- Clearly define stakeholder services we provide. Work with departmental change champions to collaborate regarding Sponsored Projects Accounting Compliance's (SPAC) services and procedures and communicate the outcomes of said collaborations

to campus. Publish best practices, expectations, and timelines for post-award activities. Collaborate with other comparable Universities on post-award to identify areas for improvement within post-award. (F&AS)

- Create a Diversity, Equity, and Inclusion (DEI) strategic plan for A&F. (OSVP)

Strategic Outcome 2 Goals:

- Collaborate with University partners to create a standard unconscious bias training program for all A&F employees involved in the hiring process (supervisors, hiring managers, interview participants). (OSVP)
- All A&F employees will participate in unconscious bias training. (OSVP)
- Recruit and retain a diverse workforce committed to UMB's Core Values by ensuring competitive salary and benefits, providing opportunities for training and advancement, and promoting a positive workplace culture, with a fully staffed department by July 2023. (PS)
- Strengthen efforts to recruit and retain a diverse workforce by assessing and implementing competitive compensation strategies. (HRS) Effective communication between recruitment partners. Implement innovative recruitment and retention strategies. Enhancement and implementation of onboarding across Facilities and Operations. (F&O)

Strategic Outcome 3 Goals:

- Strengthen employee onboarding and offboarding process. (HRS)
- Develop UMB Future of Work strategies that support flexible work arrangements and schedules to address the current and future needs of the workforce. (HRS)
- Coordinate semi-annual DEI events that incorporate elements of diversity, equity, and inclusion across the division. (OSVP)

Strategic Outcome 4 Goals:

- Increase and improve communication and customer service through improved electronic means both internally within F&O and external. Specific: Review current e-communication (websites, newsletters), update or develop improved electronic communication (revamp forms, FAQs, important dates), develop feedback methods. (F&O)
- Develop and sustain consistent public safety communications with the UMB community to build resiliency and increase knowledge of departmental initiatives and resources by 15 percent over current subscriber base (from public safety survey responses earlier this year). (PS)
- The A&F Customer Service Program – Service with Excellence: One Interaction at a Time – will be implemented and monitored for sustainability and improvement. (OSVP)
- Strengthen internal and external communication and customer service to ensure greater support, consistency, and transparency. (HRS)

Theme 4: Innovation and Reimagination

Strategic Outcome 2 Goals:

- Collaboratively update the A&F website to be accurate, personalized, and professional-looking. Establish structure that allows for easy access of unit-specific information and who to go to for the information they need (limit the # of keystrokes to access info). Strive to create standard templates, branding/theme for layout. Utilize existing A&F unit updates to evaluate pathway for updating web content. All units to connect with stakeholders to identify needs via focus groups or survey, if not already done so. (OSVP)
- Revamp the Small Business Reserve (SBR) and Minority Business Enterprise (MBE) reporting processes to be more efficient including: 1) working on interface to ingest Maryland Department of Transportation (MDOT) data for reporting, 2) adding codes in Quantum Financials to identify whether a Purchase Order (PO) has a MBE subcontracting plan, 3) adding commodity codes to include United Nations Standard Products and Services Code (UNSPSC) taxonomy, and 4) use of eForms for submitting data, routing for approval, and capturing information in a database for reporting. Includes exploring whether data can be captured in Analytics to inform the campus on actual spending and opportunities with SBR/MBE vendors (Strategic Sourcing and Acquisition Services – SSAS- & Construction and Facilities Strategic Acquisitions – CFSA). (F&AS)
- Implement SAP Concur cloud travel system (Business Applications/Office of the Controller – OOTC- and Disbursements/Center for Information Technology Services – CITS). (F&AS)
- In conjunction with the implementation of the Oracle Human Capital Management (HCM) system we may be required to upgrade Quantum Planning Budgeting (QPB) system to Enterprise Planning Management (EPM) system which includes integration with position control functionality (BFA). (F&AS)
- Continue to work with Analytics and Student Enterprise Resource Planning (ERP) to transition Banner data to real time reporting in Quantum Analytics (OOTC-Student Financial Services - SFS). (F&AS)
- OOTC and CMAS will create functional job aids and workshops related to policies and procedures including creating a library for quick reference. (F&AS)
- Parking and Transportation Services (PTS) Installation of a new PARCS's (Parking Automated Control System) to improve the use of technology and efficiency to provide our campus users groups (Students, Faculty/Staff, Patients, Visitors, etc.) the best customer experience (F&AS)
- Streamline all recycling waste streams, and convert all campus buildings to a self-service waste model by 2026 (F&O)
- Convert all lightbulbs to LED on campus to increase campus resiliency and reduce energy consumption. Specific: •Review all current areas for non-LED bulbs •Order replacement bulbs based on numbers per building •Replace bulbs/ballasts utilizing house Operations and Maintenance (OM) staff (F&O)

- Reevaluate and define standards and specifications for design, construction, renovations, uniformity for operations, maintenance, procurement, and sustainability (F&O)
- Utilize technology to enhance campus safety. Create educational and awareness initiatives of the new technology. Create training programs on the use of that technology. (PS)
- Design and implement an Oracle Human Capital Management (HR/Payroll) cloud system. Includes implementation of position control functionality. Includes HR functionality. (HRS)
- Partner with Chief Diversity Officer and Assistant Vice President of Data Analytics to develop data metric reports and dashboards to assist departments with informed strategic decision making and to evaluate effectiveness. (HRS)
- Increase SPAC's presence. Utilize technology to develop standard practices to educate campus on post-award management in order to increase SPAC's presence. This includes redeveloping website as a learning tool for the campus. (F&AS)
- Staff Training & Knowledge/Error Reduction. Utilize technology to develop standardized and measurable learning experiences for our team. This in turn will become our basis for developing online training for the University. (F&AS)
- REPSM will gather quantitative and qualitative data for Facilities Master Planning, facilities project planning, and real estate transactions in order to scope projects correctly and meet client needs. REPSM will develop questionnaires for different project types to assist clients in identifying their space needs while also considering obstacles. (REPSM)
- Clearly define and rewrite current policies and procedures. Encouraging feedback from the schools so that we can clearly define SPAC/campus community information expectations. (F&AS)
- Implementation of procurement contract management software for CFSA and SSAS. Specific: Software was identified. Purchase and implement. Develop templates. Change management strategy – communication and education for departments and vendors. (F&O)
- Continue to lead the Funding Model Workgroup (FMWG) in the identification of duplication across schools, and between schools and administration, and collaboratively explore possibilities for producing quality services with different delivery models that will mitigate duplication and provide savings to the schools. This includes following up on the status and outcomes of prior recommendations and sharing knowledge gained by the FMWG to date with new Deans. (F&AS)
- In partnership with CITS, focus on the reporting and analytics capabilities within Quantum Analytics, single enterprise-wide reporting system. This includes enhancing the reporting and analytics in support of Financials, Sponsored Programs and Banner as well as developing reporting and analytics around new systems including HCM, SAP Concur Travel and Expense, and capturing key information residing within Facilities. (F&AS)

Theme 5: Community Partnership and Collaboration

Strategic Outcome 1 Goals:

- SSAS and CFAS will initiate a robust community outreach program within West Baltimore in consulting with Equity, Diversity, and Inclusion (EDI), Community Engagement Center (CEC), School of Social Work, and support from OOTC. SSAS will leverage data analytics to identify the type of commodities and services being purchased by departments across UMB to make information available externally. In addition, SSAS will publish internally all registered small businesses and minority businesses and their corresponding commodity and/or service. (F&AS)
- A&F units will support volunteerism, community engagement, and giving back to the Baltimore community. A&F personnel will join and/or maintain memberships in community or neighborhood associations and will actively engage with neighboring institutions, property owners, and community groups in the development of projects that impact the broader West Baltimore community. (OSVP)

Strategic Outcome 2 Goals:

- Work collaboratively with the University of Maryland School of Social Work, and other local and state partners, from Fall 2021 through 2026 and beyond to provide a safe and healthy environment to the Eutaw Street corridor through community outreach and healing centered policing initiatives. (PS)
- Expand Live Near Your Work (LNYW) catchment zones into neighborhoods where UMB is an anchor institution. (OSVP)
- Target a total of 150 homebuyers by the end of FY27 [LNYW]. (OSVP)
- Re-evaluate the LNYW program incentive structure (OSVP)
- Evaluate how the LNYW program can influence the development and promotion of amenities in program neighborhoods and implement recommended plans (OSVP)

Theme 6: Global Engagement and Education

Strategic Outcome 1 Goals:

- UMB will build and sustain a comprehensive emergency management program that meets or exceeds internationally accepted standards as set by the Emergency Management Accreditation Program (EMAP) and the American National Standard Institute (ANSI) by December of 2024. (OEM)

Strategic Outcome 4 Goals:

- Establish a UMB International Risk Management Program with the Office of Enterprise Risk Management (ERM) and the Office of Emergency Management. (IO)
- Global Hub to implement modified UMB international travel policy & procedures with Administration & Finance. (IO)
- Collaborate with ERM to perform an international insurance assessment (IO)

- Perform international operational assessments to identify areas of collaboration and develop a work plan for efficiency for international activities. (IO)
- Use operations assessments to develop international operations guides and resources for the UMB community on the 3 new global-focused websites (Global Hub, IO, MGIC). (IO)

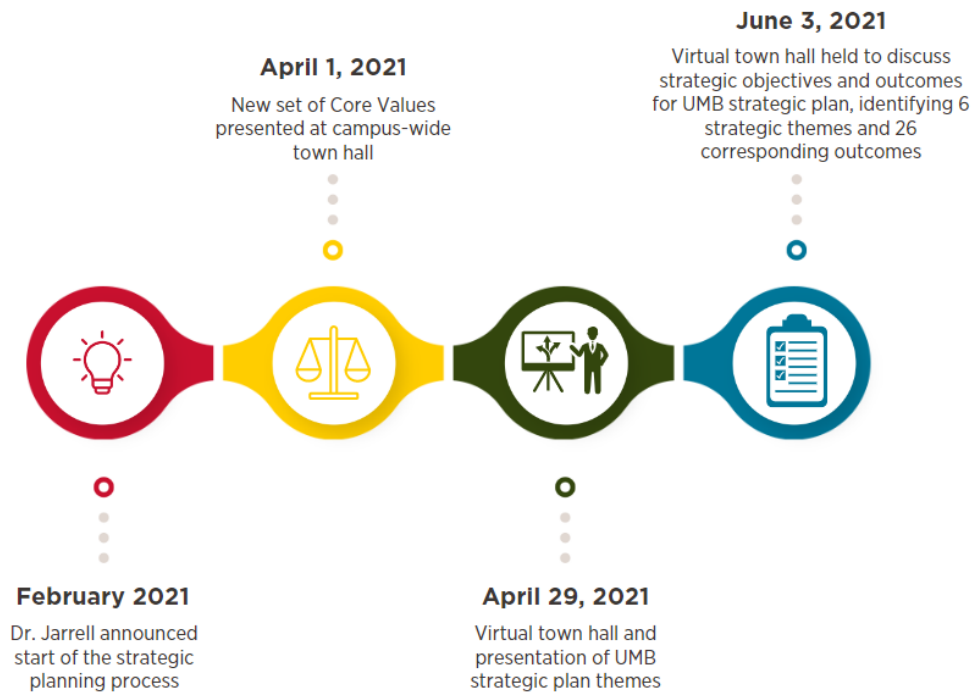
Administration and Finance – History and Context

Overview

In February 2021, Dr. Bruce Jarrell, UMB President, announced the start of the 2022-2026 strategic planning process. The strategic plan process was co-chaired by Dr. Judy Postmus, dean and professor at the University of Maryland School of Social Work, and Dr. Roger Ward, provost and executive vice president of UMB and dean of the graduate school. The strategic planning steering committee was tasked with developing a framework that would then assist UMB’s individual schools and units with developing their own strategic plans that would involve measurable goals that align with the strategic objectives and put UMB on a trajectory to realize the strategic outcomes in the plan. Dr. Jarrell committed to a model that involved “University-wide engagement, contributions, and transparency in developing new strategic priorities while fostering enhanced efficiency.”

The strategic plan process identified a new set of Core Values, which were presented campuswide in the April 1, 2021, Town Hall. Another virtual town hall on April 29, 2021, involved the presentation of the strategic plan themes, and the June 3, 2021, virtual town hall discussed the strategic objectives and outcomes for the University’s 2022-2026 Strategic Plan.

UMB Strategic Planning Timeline



In all, six (6) strategic themes were identified for the campus, and the corresponding twenty-six (26) strategic outcomes were assigned to one of the six strategic themes. A summary of each strategic theme and the corresponding strategic outcomes appears on the next page.

ACCOUNTABILITY AND INTEGRATION OF CORE VALUES

- **OBJECTIVE:** UMB will systematically integrate the core values into the organizational culture through education and demonstrated behaviors so that internal and external stakeholders clearly understand who we are as an organization and what we stand for.
- **OUTCOMES:**
 1. UMB leadership demonstrate their commitment to the core values and expect fellow leadership, faculty, staff, and students to hold the University's senior leaders accountable to those core values.
 2. UMB has a clearly articulated group of behavioral expectations related to each core value set to which faculty, staff, students, and University leaders are held accountable.
 3. UMB operationalizes the core values in each school and administrative unit through activities including talent management, employee development and empowerment, and enhancements to student learning and experiences.
 4. UMB uses reliable quantitative and qualitative data to provide transparent metrics to demonstrate and document the University community's

STUDENT GROWTH AND SUCCESS

- **OBJECTIVE:** UMB will design and implement collaborative, inclusive, respectful, and accessible academic learning environments that equitably support and develop students to become exemplary professionals and purposeful contributors to society.
- **OUTCOMES:**
 1. UMB provides academic programs, offerings, and services that are accessible to students of all racial and ethnic backgrounds, income levels, and social identities.
 2. UMB develops and implements anti-racist and anti-oppressive policies, practices, and programming that promote student well-being, belonging, and success.
 3. UMB enhances student learning and innovation through creative and effective teaching methods developed through collaborative and agile faculty development initiatives.
 4. UMB engages students and fosters their passions and skills to prepare them for meaningful self-reflection and ethical careers in alignment with the University's core values.
 5. UMB engages a diverse alumni community that supports and creates sustainable connections for student mentoring, networking, and

UNIVERSITY CULTURE, ENGAGEMENT, AND BELONGING

- **OBJECTIVE:** UMB will create a sustainable, equitable, and inclusive culture of care that collaboratively engages and embraces all members of the University community, and the broader community, with respect and in a manner that fosters belonging, understanding, trust, and equity.
- **OUTCOMES:**
 1. UMB is inclusive and actively seeks input from stakeholders at all levels and of all backgrounds when identifying opportunities, planning and setting goals, and making decisions.
 2. UMB actively recruits, retains, supports, and advances diverse students, faculty, and staff, demonstrating a commitment to our core value set of Equity and Justice.
 3. UMB provides professional and educational programs and initiatives that build capacity, equity, and respect, and support the well-being, sense of belonging, and success of all members of the University community.

INNOVATION AND REIMAGINATION

- **OBJECTIVE:** UMB will foster an agile, creative, and risk-tolerant learning environment, boldly capitalizing on new opportunities, technologies, and the power of collaboration to discover meaningful solutions to the complex problems impacting UMB, its schools, its strategic partners, and communities.
- **OUTCOMES:**
 1. UMB nurtures an environment of research and discovery that probes and answers challenging questions, openly shares knowledge, and improves the human condition.
 2. UMB promotes the use of applicable new technologies and data-driven analytics, promoting student success, groundbreaking discoveries, employee productivity, and administrative effectiveness.
 3. UMB embraces a broad and collaborative culture encouraging the free exchange of ideas, acknowledging the importance of risk-taking for bold gains and learning from failures and successes.
 4. UMB fosters excellence in teaching and learning by adopting best-in-class design and pedagogical practices to prepare students for promising,

COMMUNITY PARTNERSHIP AND COLLABORATION

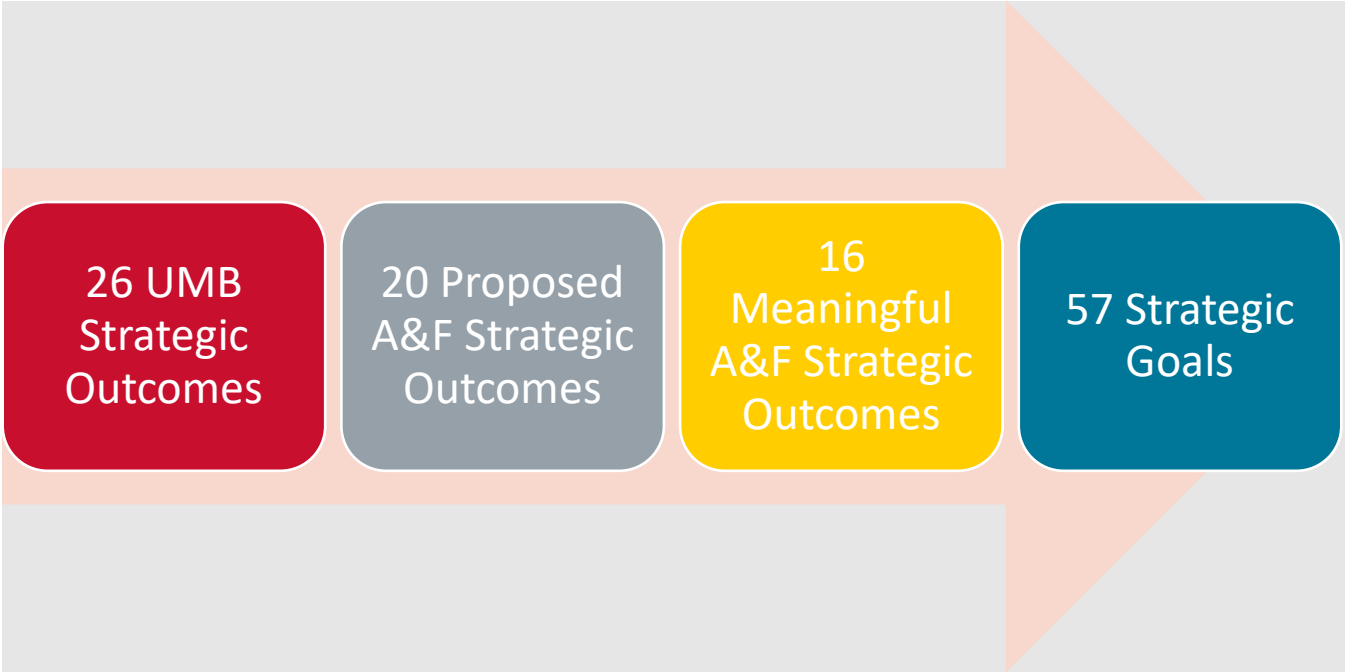
- **OBJECTIVE:** UMB will formalize and embrace a Universitywide approach to community engagement and scholarship that fosters inclusive and equitable partnerships with our neighbors.
- **OUTCOMES:**
 1. UMB becomes a trusted partner and resource as we learn from the history of our own institution and further build relationships with our neighbors in West Baltimore and across Maryland.
 2. UMB honors, acknowledges, and values community sovereignty and the wisdom of our neighbors and actively integrates the knowledge, experience, and expertise of community members to measure and document the impact of UMB's health, legal, social, and economic development programs.
 3. UMB values and rewards teaching, research, and service that is grounded in community engagement as well as holds faculty, staff, and University leaders accountable for ethical and mutually beneficial community engagement practices.
 4. UMB develops, establishes, and maintains strategic partnerships among our seven schools, other University System of Maryland institutions, and the University of Maryland Medical System to resource, coordinate, and support community initiatives that can become a local, regional, and

GLOBAL ENGAGEMENT AND EDUCATION

- **OBJECTIVE:** UMB will enhance its impact and reputation as a globally engaged institution committed to improving the human condition through engagement, education, and research.
- **OUTCOMES:**
 1. UMB is committed to and promotes interdisciplinary, innovative, equitable, and sustainable solutions to domestic and global challenges.
 2. UMB provides students the opportunity and institutional support to engage in global learning.
 3. UMB expands University programs that value, support, and celebrate the richness and expertise of international students, scholars, faculty, and staff.
 4. UMB provides enhanced operational support and a knowledge platform with which the schools and functional units align their programs and processes to develop global collaborations, track global activities, and share successes.

Similarly, the 2022-2026 Administration and Finance (A&F) strategic planning process involved a logical and engaging process that involved all units within the division, some 87 different employees at various levels of the division and engaged not only our employees but also our key campus stakeholders through two separate surveys, one to each group. Led by Dr. Dawn Rhodes, Senior Vice President and Chief Business and Finance Officer and Karen Park, Chief of Staff and Director of Strategic Projects, the A&F strategic planning process also focused on developing goals and underlying metrics, focusing on strategic outcomes that would meaningfully contribute to the future of UMB.

After eight (8) meetings over the course of eleven (11) months and two sets of survey data, the A&F strategic plan narrowed its focus from the twenty-six (26) original strategic outcomes, developed by the UMB strategic planning committee lead by Drs. Postmus and Ward, down to 20 strategic outcomes. From these 20 outcomes, the focus of the 2022-2026 A&F Strategic Plan was narrowed down to concentrate on 16 strategic outcomes, based on the survey results from both A&F employees and stakeholders and from where the A&F team members believed they could have the most meaningful impact. Finally, these remaining 16 outcomes were ranked and prioritized to develop 57 goals for the 2022-2026 A&F Strategic Plan.



History - Administration and Finance Units

The 2022-2026 Administration and Finance strategic planning process followed the expansion of the division during the previous strategic plan cycle (2017-2021). During the previous five years, the following units were added to or were significantly expanded within A&F:

- Department of Public Safety – added in March 2018 - led by Police Chief Tom Leone
- Human Resources – added in February 2020 – led by Malika Monger, Associate Vice President and Chief Human Resources Officer

- Office of Emergency Management – added in May 2018 – led by Jon Bratt, Executive Director
- International Affiliate Support (expanded and will become the International Operations Office in FY23) – previously led by Jennifer Flinn, Executive Director (currently seeking an Assistant Vice President)

These additional and expanded units joined the following units to comprise the division of Administration and Finance (A&F):

- Facilities and Operations, led by Nazanin Fouladi, Associate Vice President
- Finance and Auxiliary Services, led by Scott Bitner, Vice President and Deputy Chief Business Officer
- Office of the Senior Vice President, led by Karen Park, Chief of Staff and Director of Strategic Projects
- Real Estate, Planning, and Space Management, led by Luke Mowbray, Director

During FY22, Sponsored Projects Accounting and Compliance (SPAC), which is led by Laura Scarantino, Assistant Vice President, was restructured into Finance and Auxiliary Services.

A General History – The A&F Strategic Planning Process, 2022-2026

The table below outlines the A&F meeting timeline and how the process unfolded. For each meeting, a brief summary of the meeting’s objectives is provided.

Meeting Date	Meeting Description	Meeting Objectives
July 2021	Core Values: Part 1	<ul style="list-style-type: none"> • Review of current A&F Guiding Principles • Review of NEW UMB Core Values Pairs • Review of Carryover goals from 2021-2017 cycle • New A&F Core Value for Service Excellence
August 2021	Core Values: Part 2	<ul style="list-style-type: none"> • Review of proposed changes to A&F Mission statement • Discussion of proposed Core Values Changes • Review of Strategic Outcomes by Theme (Community Partnership/Collaboration and Global Engagement/Education) • Identify strategic outcomes by theme
October 2021	Outcomes Part 1: Identify	<ul style="list-style-type: none"> • Review of remaining UMB Strategic Themes: Accountability/Integration of Core Values, Innovation/Reimagination, Student Growth/Success, University Culture/Engagement/Belonging • Identified 5 groups of 3 volunteers to author Guiding Principles to define the Guiding Principles
November 2021	Outcomes Part 2: Validate	<ul style="list-style-type: none"> • Group presentations of Guiding Principles definitions • Group break-out to discuss Guiding Principles definitions • Group Vote on agreement of Guiding Principles definitions • Review of strategic plan survey results to A&F employees • Identified UMB campus stakeholders to receive the A&F survey on the 16 Strategic Outcomes

Meeting Date	Meeting Description	Meeting Objectives
January 2022	Outcomes Part 3: Validate, Goals Prep	<ul style="list-style-type: none"> • Final presentation of Guiding Principles language, with Leadership Survey results being presented • Review of Stakeholder survey results, comparison to A&F survey data • Break-out meetings by AVP areas to discuss the data results and brainstorm unit and inter-disciplinary projects by Outcome
March 2, 2022	Outcomes Part 4: Goals Prep, Prioritization	<ul style="list-style-type: none"> • Overview of SMART goal components • Group break-out by AVP area <ul style="list-style-type: none"> ○ Discuss unit-specific and inter-disciplinary projects by outcome ○ Consider metrics ○ Identify no more than 5 goals with metrics for each area
March 23, 2022	Finalize Goals: Part 1	<ul style="list-style-type: none"> • Presentation by AVP of their unit-specific goals • Identify volunteers to write the strategic plan document
April 26, 2022	Finalize Goals: Part 2	<ul style="list-style-type: none"> • Continue review of new 2022-2026 goals • Review of goals that needed editing from March 23rd meeting • Review of carryover goals from 2017-2021 strategic plan cycle
April 2022 Follow-Up	Risk Factor Assignments	<ul style="list-style-type: none"> • One of thirteen (13) primary risk factors is to be considered for each goal created

Available on Page 8 of this document are the new UMB Core Values descriptions, the additional Core Value pair that now makes up the A&F Guiding Principles, the thirteen (13) risk factors to be considered for each goal, as well as the themes and outcomes of the UMB Strategic Plan 2022-2026.

A Specific History – The A&F Strategic Planning Process, 2022-2026

July and August 2021 Meetings

The *July and August 2022 strategic planning meetings* focused on the:

1. Review of any carryover goals from the previous strategic planning cycle;
2. Review of the new UMB Core Values;
3. Discussion of the UMB Core Values and their implications for A&F Guiding Principles;
4. Addition of a fifth Core Values pair – Service Excellence and Accountability – to the existing four UMB Core Values pairs;
5. Consideration of whether the existing A&F Mission or Vision statements should be revised (only the Mission statement was modified); and

6. Discussion of Strategic Outcomes by Themes, beginning with:
 - a. Community Partnership and Collaboration
 - b. Global Engagement and Education.

Carryover Goals

In all, twenty (20) carryover goals from the 2017-2021 strategic plan cycle were identified for review by the leadership group. These were goals that were not completed by the end of FY21. Group discussion identified that goals would first be classified into one of three categories:

1. to be continued from the previous strategic planning cycle;
2. to be continued with modifications from the previous strategic planning cycle; or
3. to be canceled, removed, or changed to a unit operational strategy.

At the end of this group discussion, six (6) goals were identified to move forward into the 2022-2026 strategic planning cycle, and seven (7) goals were ultimately created out of these in the new plan.

UMB Core Values Pairs Discussion with Implications for A&F Guiding Principles

The 2022-2026 UMB Strategic Plan cycle brings with it a new set of Core Values. In this cycle, pairs of core values were created: Wellbeing and Sustainability, Innovation and Discovery, Respect and Integrity, and Equity and Justice. In the July 2021 A&F strategic planning meeting, the leadership broke into groups in an effort to identify any additional Core Value sets that they'd like to add for A&F, to consider whether any of the Core Values sets should be eliminated, or if A&F should accept the Core Value sets as proposed. For any new Core Values sets, the group was asked to create a definition and present the rationale for its creation.

Dr. Rhodes highlighted the need for the groups to consider a Core Value related to customer service. With the UMB Core Values, any additional proposals would be added and reframed as the A&F Guiding Principles.

Group discussion revealed that many liked the Service Excellence and Accountability set of Core Values, and a proposed definition was discussed within the team.

Later in December 2021, a formal survey of the final language of the Guiding Principles, which include the four UMB Core Values plus the Service Excellence and Accountability set, was conducted.

Review of A&F Mission and Vision Statements

Also reviewed in the July 2021 meeting were the current A&F Mission and Vision statements. Minor changes to the Mission statement were proposed, leading to the new language, "To deliver exceptional service to the University community through professionalism, stewardship, and leadership one interaction at a time," with the "to deliver exceptional" being the additional language from the previous version.



Discussion of Strategic Outcomes by Themes

The July meeting began with a brief overview of the structure of the strategic process. The figure below highlights the general process at which themes, strategic objectives, strategic outcomes, and



goals are created. This framework was used by the UMB strategic planning steering committee co-chaired by Drs. Postmus and Ward. The focus of the A&F strategic planning process was to identify to which strategic outcomes that A&F could contribute the most and then identify within each outcome which goals would provide the most meaningful direction for the division.

The strategic outcomes discussed in the July and August 2022 meetings included: Community Partnership and Collaboration and Global Engagement and Education. During the meeting, participants were randomly assigned to one of 10 groups, and each group was asked to identify with a “yes” or “no” whether the associated strategic outcome is one that would be meaningful for A&F to consider in the 2022-2026 strategic plan.

Any strategic outcome that received a “yes” answer was scored a “1.” Any with a “no” answer was scored a “0.” The results of the meeting poll are as follows:

Outcome # / Group #	Community Partnership and Collaboration				Global Engagement and Education			
	1	2	3	4	1	2	3	4
Group 1	1	1	1	1	1	0	1	1
Group 2	1	1	1	1	1	0	0	0
Group 3	1	1	1	1	1	1	1	1
Group 4	1	1	1	1	0	0	1	1
Group 5	1	1	0	1	1	0	0	1
Group 6	1	1	1	1	1	1	1	1
Group 7	1	1	0	1	1	0	0	1
Group 8	1	1	1	1	1	1	1	1
Group 9	1	1	1	1	1	1	0	1
Group 10	1	0	1	1	1	1	1	1
TOTALS	10	9	8	10	9	5	6	9
<i>Average</i>	<i>1.0*</i>	<i>0.9*</i>	<i>0.8*</i>	<i>1.0*</i>	<i>0.9*</i>	<i>0.5*</i>	<i>0.6*</i>	<i>0.9*</i>

**Post-meeting, these strategic outcomes were identified by Dr. Rhodes as those that would proceed to the next level of discussion and consideration for inclusion in the A&F strategic plan.*

In follow-up to this voting, the meeting ended with participants being asked to consider which questions to create for inclusion in the survey to A&F staff and its stakeholders on campus. The surveys would focus on the remaining 20 strategic outcomes.



Caption: A&F staff during a strategic planning meeting in March 2022.

October and November 2021 Meetings

The *October and November 2022 strategic planning meetings* focused on the:

1. Continued discussion of the Strategic Outcomes on the four remaining Themes:
 - a. Innovation and Reimagination
 - b. Integration and Accountability of Core Values
 - c. Student Growth and Success
 - d. University Culture, Engagement, and Belonging
2. Final discussion of the proposed language for the A&F Guiding Principles sets;
3. Group vote on the proposed final language for the A&F Guiding Principles
4. A&F survey on the Strategic Outcomes that are most meaningful to pursue

The *October and November 2022 strategic planning meetings* continued the review of the Strategic Outcomes by Themes. In the October 2022 meeting, the Themes of Integration and Accountability of Core Values, Innovation and Reimagination, Student Growth and Success, and University Culture, Engagement, and Belonging were reviewed. As with the August meeting, participants were again randomly assigned to one of 10 groups and asked to identify with a “yes” or “no” whether the corresponding strategic outcome is one that would be meaningful for A&F to consider in the 2022-2026 strategic plan. The next two tables present the results of the group votes, with two strategic themes and their corresponding outcomes presented in each.

	Accountability and Integration of Core Values				Innovation and Reimagination			
Outcome # / Group #	1	2	3	4	1	2	3	4
Group 1	1	1	1	1	1	1	1	0
Group 2	1	1	1	1	1	1	1	0
Group 3	1	1	1	1	1	1	1	0
Group 4	1	1	1	1	1	1	1	1
Group 5	1	1	1	1	1	1	1	0
Group 6	1	1	1	1	1	1	1	1
Group 7	1	1	1	1	1	1	1	0
Group 8	1	1	1	0	1	1	1	0
Group 9	1	1	1	1	1	1	1	1
Group 10	1	1	1	1	0	1	1	0
TOTALS	10	10	10	9	9	10	10	3
<i>Average</i>	<i>1.0*</i>	<i>1.0*</i>	<i>1.0*</i>	<i>0.9*</i>	<i>0.9*</i>	<i>1.0*</i>	<i>1.0*</i>	<i>0.3</i>

	Student Growth and Success					University Culture, Engagement, and Belonging			
Outcome # / Group #	1	2	3	4	5	1	2	3	4
Group 1	0	0	0	0	0	1	1	1	1
Group 2	1	0	0	0	0	1	1	1	1
Group 3	1	1	0	1	0	1	1	1	1
Group 4	1	1	1	1	1	1	1	1	1
Group 5	0	0	0	1	0	1	1	1	1
Group 6	1	1	1	1	1	1	1	1	1
Group 7	0	1	0	1	1	1	1	1	1
Group 8	1	1	1	0	0	1	1	1	1
Group 9	0	1	0	0	0	1	1	1	1
Group 10	1	0	0	0	0	1	1	1	1
TOTALS	6	6	3	5	3	10	10	10	10
<i>Average</i>	<i>0.6</i>	<i>0.6*</i>	<i>0.3</i>	<i>0.5</i>	<i>0.3</i>	<i>1.0*</i>	<i>1.0*</i>	<i>1.0*</i>	<i>1.0*</i>

**Post-meeting, these strategic outcomes were identified by Dr. Rhodes as those that would proceed to the next level of discussion and consideration for inclusion in the A&F strategic plan.*

With these results, the A&F team had identified its 20 strategic outcomes to move forward for further consideration into the strategic plan, and these 20 strategic outcomes were then queued up for two separate surveys that would be completed in December 2021.

Prior to the conclusion of the October 2021 strategic planning meeting, a large group activity focused on discussing the A&F Guiding Principles. Five (5) volunteer groups of three (3) people were identified as Guiding Principles authors, who would initially describe the behaviors associated with each set. Each group took notes during the discussion and then were assigned to

draft definitions that would be discussed in the November 2021 strategic planning meeting. Members of each core values definition teams are identified below:

- Well-Being and Sustainability – Anna Borgerding, Jean Graziano, Patti Hoffmann
- Innovation and Discovery – Carin Morrell, Todd Ring, Michelle Stezelberger
- Service Excellence and Accountability – Mark Emmel, Hayley Markman, Denise Meyer
- Equity and Justice – Duane Harrington, Tom Leone, Cindy Lyons
- Respect and Integrity – Chad Ellis, Tyrell Fleming, Dennis Smith

The November 2021 meeting began with the Guiding Principles discussion. Each of the five groups of volunteer authors presented their proposed definitions. Attendees then broke out into random groups of 4-5 people to discuss their reactions to the proposed definitions. During the meeting a vote was taken on each of the paired Guiding Principles to measure the agreement with the proposed definitions for each core value pair.

The group then focused its efforts on the original evaluation of the 26 strategic outcomes, how the strategic planning meeting process had narrowed down the list to 20 strategic outcomes for the upcoming surveys, and then the review on 11/4/2021 by Dr. Rhodes's direct reports and which narrowed down the list to 16 strategic outcomes. The group then focused its efforts on discussing the Theme of Innovation and Reimagination.

NOTE: Subsequent to the November meeting, the Guiding Principles were updated in late-November 2021 and then reviewed and edited by the Leadership Team (Dr. Rhodes's direct reports) in early-December.

Prior to the conclusion of the November 2021 strategic planning meeting, the groups discussed which stakeholder groups should receive the A&F Campus Stakeholder Survey – 2022-2026 Strategic Plan, which would measure how the division's stakeholders viewed the strategic outcomes that would be most meaningful for A&F to pursue. This survey was created by Karen and distributed in early-December, with 5 weekly notifications sent to ask respondents to complete the survey, which closed the first week in January 2022.

Also, in follow-up to the November 2022 strategic planning meeting, Ms. Park conducted four (4) separate focus group meetings and distributed the internal survey to A&F employees. Two (2) meetings were conducted with Public Safety personnel, and two (2) meetings were conducted with Environmental Services (EVS) personnel. In total, 21 Public Safety and 10 EVS personnel participated. The internal survey was distributed to all active A&F employees at the time – roughly 700. Appendix A outlines the survey given to each of the four focus groups, and Appendix B outlines the survey sent to internal employees of A&F.



Caption: A group of Environmental Services (EVS) employees are celebrated as Cleaning Week Champions during National Cleaning Week, March 27 – April 2, 2022.

January 2022 Meeting

The results of these two surveys were the focus of the *January 2022 strategic planning meeting*.

The results of the A&F Core Leadership – Guiding Principles Survey were reviewed. This survey had been distributed in December 2021 and asked respondents to either commit to the language proposed for the A&F Guiding Principles with either a “yes” or “no” response. Each of the five (5) proposed pairs of Guiding Principles was presented along with the Preamble. The survey content is presented in Appendix D, and the results of the survey are below. The survey was sent to 69 individuals, with 43 responses recorded, for a 62.3% response rate. After review of the survey results, the final language for the Guiding Principles was adopted (1/26/2022).

	Yes	No	Totals
Preamble	42 (97.67%)	1 (2.33%)	43
W	41 (98.62%)	1 (2.38%)	42
I	40 (93.02%)	3 (6.98%)	43
S	41 (95.35%)	2 (4.65%)	43
E	41 (97.62%)	1 (2.38%)	42
R	43 (100.0%)	0 (0.00%)	43

The A&F Campus Stakeholder Survey – 2022-2026 Strategic Plan (Appendix C) was distributed to 941 stakeholders. A total of 379 (40.3%) responded with their employee classification, with staff responses comprising nearly 93% of all responses:

	Count	% of Total	Cumulative
Faculty	18	4.75%	4.75%
Staff	352	92.88%	97.63%
Student	0	0.00%	97.63%
Contractor/Other	9	2.37%	100.00%
Total Responses	379		

The break-down of respondents by school or administrative unit is below. For this section, the survey received 376 (40.0%) responses.

	Count	% of Total	Cumulative
Central Administration	139	36.97%	36.97%
Carey School of Law	8	2.13%	39.10%
Graduate School	3	0.80%	39.89%
School of Dentistry	19	5.05%	44.95%
School of Medicine	140	37.23%	82.18%
School of Nursing	21	5.59%	87.77%
School of Pharmacy	27	7.8%	94.95%
School of Social Work	19	5.05%	100.00%
Total Responses	376		

This survey presented each of the remaining 16 strategic outcomes and asked respondents to rate their level of agreement as to whether each strategic outcome is one on which A&F should focus its time and talents. Stakeholders were also then asked to identify any other eliminated strategic outcomes (6 in total) that should be an A&F focus in the next planning cycle.

Responses to each of the strategic outcomes were rated on a 1-5 scale, with the ratings described below:

- 1 = Not At All Important
- 2 = Slightly Important
- 3 = Moderately Important
- 4 = Very Important
- 5 = Extremely Important

Respondents were also asked to rank-order, or prioritize, each of the 16 remaining strategic outcomes. While this data was helpful for discussion purposes, the prioritization ranking information was later removed from final consideration in the goals development phase.

For all strategic outcomes, an average (or “worthiness score”) and standard deviation were calculated. The summary averages are shown below. This data reflects the comparison of the A&F survey averages against the Stakeholder survey averages.

Theme	SO #	A&F Survey	Stakeholder Survey
		Worthiness Score	Worthiness Score
Accountability and Integration of Core Values	1	4.37	4.39
Accountability and Integration of Core Values	2	4.26	4.28
Accountability and Integration of Core Values	3	4.18	4.31
Accountability and Integration of Core Values	4	3.99	4.22
Community Partnership and Collaboration	1	4.01	4.09
Community Partnership and Collaboration	2	3.93	4.11
Community Partnership and Collaboration	3	4.07	3.87
Community Partnership and Collaboration	4	4.11	4.36
Global Engagement and Education	1	3.91	3.98
Global Engagement and Education	2	3.76	3.59
Global Engagement and Education	3	3.83	3.67
Global Engagement and Education	4	3.85	3.93
Innovation and Reimagination	1	4.15	4.15
Innovation and Reimagination	2	4.31	4.40
Innovation and Reimagination	3	4.28	4.39
Student Growth and Success	2	4.33	4.45
University Culture, Engagement, and Belonging	1	4.31	4.33
University Culture, Engagement, and Belonging	2	4.29	4.41
University Culture, Engagement, and Belonging	3	4.40	4.37
University Culture, Engagement, and Belonging	4	4.33	4.43

The survey result comparison demonstrated agreement across the 16 strategic outcomes that both A&F team members and stakeholders believed A&F time and talents could be important to achieving the outcome.

Homework for the January 2022 meeting involved the groups to meet over the next two (2) weeks to identify and shape their unit and interdisciplinary projects and goals. Prior to the next meeting, the Leadership Team (Dr. Rhodes’s direct reports) would meet to discuss these proposed goals.

March 2022 Meetings

In March 2022, the leadership group met two times – once on March 2nd and then again on March 23rd – in their efforts to develop the 2022-2026 A&F Strategic Plan.

In the *March 2nd meeting*, the primary purpose was to have the leadership members break-out into groups by AVP or direct report area. Each group was tasked to identify potential unit or inter-disciplinary projects or goals for their areas. Each team was asked to identify no more than five (5) specific SMART goals with corresponding metrics.

SMART goals are defined, as follows:

- Specific – Defines a clear, specific goal
- Measurable – Progress can be tracked
- Achievable – Can realistically be attained
- Relevant – Aligned with organization’s mission
- Time-Bound anchored – Has a clear start and end date



Each of the groups began their presentation of their developed goals. The group worked through the process by starting with Theme 1, Outcome 1 and working their way through each of the goals until completing with Theme 6, Outcome 4. Only those Strategic Outcomes for which goals were

created were presented and discussed. The group was able to discuss through Theme 4, Outcome 2 and tabled the remaining goals discussion for the next meeting.

The homework assigned to the group included the wordsmithing of the goals that had been reviewed and identified for edits and the continued development of goals that had not been yet discussed within the strategic planning meetings.

April 2022 Meeting

The April 26, 2022, meeting focused on discussing the remaining goals developed, starting with Theme 4, Outcome 2 and then presenting and discussing the proposed goals through Theme 6, Outcome 4. Once the discussion on these goals was complete, the team focused on the six (6) carryover goals that had been identified from the previous strategic planning cycle. Between the March 23rd meeting and the April 2022 meeting, Dr. Rhodes and Ms. Park had worked offline to define and share with the appropriate AVP/direct report the final language and proposed metrics for each of these goals. In all, 57 goals were identified by A&F for the 2022-2026 strategic planning cycle, and these goals can be found on Pages 9-14.

There was no assigned homework for the April 2022 meeting, as it was identified as the last group meeting in the 2022-2026 A&F Strategic Planning process. However, the Leadership Team (Dr. Rhodes's direct reports) would be meeting to discuss the primary and second Risk Factors to be assigned to the goals. From here, Ms. Park would be entering all of the goals into the UMB SPIMS database, and she would lead the small group of volunteers to write the strategic planning document.

April 2022 Meeting Follow-Up

In mid-May, the Leadership Team, comprised of the direct reports to Dr. Rhodes, met to assign one of thirteen (13) risk factors to each of the developed strategic goals. New to this strategic plan cycle, the risk factors will allow A&F to report on progress and issues for each goal, and the Office of Enterprise Risk Management (ERM) will be monitoring these risk categories and reports on a campuswide basis.

Note of Appreciation

Dr. Rhodes would like to thank four of the A&F staff who volunteered to write this final strategic plan document: Anna Borgerding, Lisa Crawley, Steve Deck, and Elizabeth Main joined Ms. Park in the endeavor, with the target of completing the document by the end of May 2022.

APPENDIX A





















Administration and Finance

Strategic Planning Focus Groups Survey

INSTRUCTIONS: For each Theme listed below, please identify your level of agreement as to whether YOU see this strategic outcome as an important one on which A&F should focus its time and talents.















Theme 1: ACCOUNTABILITY AND INTEGRATION OF CORE VALUES

Objective: UMB will systematically integrate the Core Values into the organizational culture through education and demonstrated behaviors so that internal and external stakeholders clearly understand who we are as an organization and what we stand for.

Outcome #	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
<u>1:</u> UMB leadership demonstrates their commitment to the Core Values and expects fellow leadership, faculty, staff, and students to hold the University's senior leaders accountable to those Core Values.					
<u>2:</u> UMB has a clearly articulated group of behavioral expectations related to each Core Value set to which faculty, staff, students, and University leaders are held accountable.					
<u>3:</u> UMB operationalizes the Core Values in each school and administrative unit through activities including talent management, employee development and empowerment, and enhancements to student learning and experiences.					
<u>4:</u> UMB uses reliable quantitative and qualitative data to provide transparent metrics to demonstrate and document the University community's ongoing efforts at aligning behavior with the expectations inherent in our Core Values.					





















Theme 2: COMMUNITY PARTNERSHIP AND COLLABORATION

Objective: UMB will formalize and embrace a university-wide approach to community engagement and scholarship that fosters inclusive and equitable partnerships with our neighbors.

Outcome #	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
<p><u>1:</u> UMB becomes a trusted partner and resource as we learn from the history of our own institution and further build relationships with our neighbors in West Baltimore and across Maryland.</p>					
<p><u>2:</u> UMB honors, acknowledges, and values community sovereignty and the wisdom of our neighbors and actively integrates the knowledge, experience, and expertise of community members to measure and document the impact of UMB's health, legal, social, and economic development programs.</p>					
<p><u>3:</u> UMB values and rewards teaching, research, and service that is grounded in community engagement as well as holds faculty, staff, and University leaders accountable for ethical and mutually beneficial community engagement practices.</p>					
<p><u>4:</u> UMB develops, establishes, and maintains strategic partnerships between our seven schools, other USM institutions, and the University of Maryland Medical System to resource, coordinate, and support community initiatives that can become a local, regional and national model for others to replicate.</p>					
















Theme 3: GLOBAL ENGAGEMENT AND EDUCATION

Objective: UMB will enhance its impact and reputation as a globally-engaged institution committed to improving the human condition through engagement, education, and research.

Outcome #	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
<p><u>1:</u> UMB is committed to and promotes interdisciplinary, innovative, equitable, and sustainable solutions to domestic and global challenges.</p>					
<p><u>2:</u> UMB provides students the opportunity and institutional support to engage in global learning.</p>					
<p><u>3:</u> UMB expands University programs that value, support, and celebrate the richness and expertise of international students, scholars, faculty, and staff.</p>					
<p><u>4:</u> UMB provides enhanced operational support and a knowledge platform with which the schools and functional units align their programs and processes to develop global collaborations, track global activities, and share successes.</p>					

Theme 4: INNOVATION AND REIMAGINATION

Objective: UMB will foster an agile, creative, and risk-tolerant learning environment, boldly capitalizing on new opportunities, technologies, and the power of collaboration to discover meaningful solutions to the complex problems impacting UMB, its Schools, and its strategic partners, and communities.

Outcome #	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
<u>1:</u> UMB nurtures an environment of research and discovery that probes and answers challenging questions, openly shares knowledge, and improves the human condition.					
<u>2:</u> UMB promotes the use of applicable new technologies and data-driven analytics, promoting student success, groundbreaking discoveries, employee productivity, and administrative effectiveness.					
<u>3:</u> UMB embraces a broad and collaborative culture encouraging the free exchange of ideas, acknowledging the importance of risk-taking for bold gains, and learning from failures and successes.					





















Theme 5: STUDENT GROWTH AND SUCCESS

Objective: UMB will design and implement collaborative, inclusive, respectful, and accessible academic learning environments that equitably support and develop students to become exemplary professionals and purposeful contributors to society.

Outcome #	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
<u>2:</u> UMB develops and implements anti-racist and anti-oppressive policies, practices, and programming that promote student well-being, belonging, and success.					

Theme 6: UNIVERSITY CULTURE, ENGAGEMENT, AND BELONGING

Objective: UMB will create a sustainable, equitable, and inclusive culture of care that collaboratively engages and embraces all members of the University community, and the broader community, with respect and in a manner that fosters belonging, understanding, trust, and equity.

Outcome #	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
<p><u>1:</u> UMB is inclusive and actively seeks input from stakeholders at all levels and all backgrounds when identifying opportunities, planning and setting goals, and making decisions.</p>					
<p><u>2:</u> UMB actively recruits, retains, supports, and advances diverse students, faculty, and staff, demonstrating a commitment to our Core Values of Equity and Justice.</p>					
<p><u>3:</u> UMB provides professional and educational programs and initiatives that build capacity, equity, and respect, and support the well-being, sense of belonging, and success of all members of the University community.</p>					
<p><u>4:</u> UMB communicates in a manner that is empowering, inclusive, and demonstrates cultural humility.</p>					

APPENDIX B

Administration and Finance

Internal Survey

Administration and Finance (A&F) Strategic Plan Survey

Administration and Finance (A&F) Strategic Plan Survey - 2022-2026

Welcome to the 2022-2026 Administration and Finance Strategic Plan Survey. In this next strategic plan cycle, there are SIX (6) overall themes, and within each theme are a number of strategic outcomes.

This survey is designed to ask you to identify your level of agreement as to whether YOU see this strategic outcome as an important one on which A&F should focus its time and talents. Toward the end of the survey, you will then be asked to rank-order all of the strategic outcomes based on how YOU see their importance for prioritization.

For each Theme listed below, please identify your level of agreement as to whether YOU see this strategic outcome as an important one on which A&F should focus its time and talents.

Theme 1: Accountability and Integration of Core Values

Objective: UMB will systematically integrate the Core Values into the organizational culture through education and demonstrated behaviors so that internal and external stakeholders clearly understand who we are as an organization and what we stand for.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
Outcome 1: UMB leadership demonstrates their commitment to the Core Values and expects fellow leadership, faculty, staff, and students to hold the University's senior leaders accountable to those Core Values.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB has a clearly articulated group of behavioral expectations related to each Core Value set to which faculty, staff, students, and University leaders are held accountable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB operationalizes the Core Values in each school and administrative unit through activities, including talent management, employee development and empowerment, and enhancements to student learning and experiences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB uses reliable quantitative and qualitative data to provide transparent metrics to demonstrate and document the University community's ongoing efforts at aligning behavior with the expectations inherent in our Core Values.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 1: Please provide additional thoughts relating to the Accountability and Integration of Core Values theme that Administration and Finance should consider when formulating strategic goals.

Theme 2: Community Partnership and Collaboration

Objective: UMB will formalize and embrace a university-wide approach to community engagement and scholarship that fosters inclusive and equitable partnerships with our neighbors.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
Outcome 1: UMB becomes a trusted partner and resource as we learn from the history of our own institution and further build relationships with our neighbors in West Baltimore and across Maryland.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB honors, acknowledges, and values community sovereignty and the wisdom of our neighbors and actively integrates the knowledge, experience, and expertise of community members to measure and document the impact of UMB’s health, legal, social, and economic development programs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB values and rewards teaching, research, and service that is grounded in community engagement as well as holds faculty, staff, and University leaders accountable for ethical and mutually beneficial community engagement practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB develops, establishes, and maintains strategic partnerships between our seven schools, other USM institutions, and the University of Maryland Medical System to resource, coordinate, and support community initiatives that can become a local, regional and national model for others to replicate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11 Theme 2: Please provide additional thoughts relating to the Community Partnership and Collaboration theme that Administration and Finance should consider when formulating strategic goals.

Theme 3: Global Engagement and Education

Objective: UMB will enhance its impact and reputation as a globally-engaged institution committed to improving the human condition through engagement, education, and research.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
Outcome 1: UMB is committed to and promotes interdisciplinary, innovative, equitable, and sustainable solutions to domestic and global challenges.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB provides students the opportunity and institutional support to engage in global learning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB expands University programs that value, support, and celebrate the richness and expertise of international students, scholars, faculty, and staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB provides enhanced operational support and a knowledge platform with which the schools and functional units align their programs and processes to develop global collaborations, track global activities, and share successes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Theme 3: Please provide additional thoughts relating to the Global Engagement and Education theme that Administration and Finance should consider when formulating strategic goals.

Theme 4: Innovation and Reimagination

Objective: UMB will foster an agile, creative, and risk-tolerant learning environment, boldly capitalizing on new opportunities, technologies, and the power of collaboration to discover meaningful solutions to the complex problems impacting UMB, its Schools, and its strategic partners, and communities.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
Outcome 1: UMB nurtures an environment of research and discovery that probes and answers challenging questions, openly shares knowledge, and improves the human condition.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB promotes the use of applicable new technologies and data-driven analytics, promoting student success, groundbreaking discoveries, employee productivity, and administrative effectiveness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB embraces a broad and collaborative culture encouraging the free exchange of ideas, acknowledging the importance of risk-taking for bold gains, and learning from failures and successes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13 Theme 4: Please provide additional thoughts relating to the Innovation and Reimagination theme that Administration and Finance should consider when formulating strategic goals.

Theme 5: Student Growth and Success

Objective: UMB will design and implement collaborative, inclusive, respectful, and accessible academic learning environments that equitably support and develop students to become exemplary professionals and purposeful contributors to society.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
Outcome 2: UMB develops and implements anti-racist and anti-oppressive policies, practices, and programming that promote student well-being, belonging, and success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14 Theme 5: Please provide additional thoughts relating to the Student Growth and Success theme that Administration and Finance should consider when formulating strategic goals.

Theme 6: University Culture, Engagement, and Belonging

Objective: UMB will create a sustainable, equitable, and inclusive culture of care that collaboratively engages and embraces all members of the University community, and the broader community, with respect and in a manner that fosters belonging, understanding, trust, and equity.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important
Outcome 1: UMB is inclusive and actively seeks input from stakeholders at all levels and all backgrounds when identifying opportunities, planning and setting goals, and making decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB actively recruits, retains, supports, and advances diverse students, faculty, and staff, demonstrating a commitment to our Core Values of Equity and Justice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB provides professional and educational programs and initiatives that build capacity, equity, and respect, and support the well-being, sense of belonging, and success of all members of the University community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB communicates in a manner that is empowering, inclusive, and demonstrates cultural humility.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 6: Please provide additional thoughts relating to the University Culture, Engagement, and Belonging theme that Administration and Finance should consider when formulating strategic goals.

Now, we'd like to ask you to rank-order all of the strategic outcomes based on how YOU see their importance for prioritization. The highest priority strategic outcome would be ranked as "1," the second highest as "2," etc. Simply drag and drop each outcome based on how you see each should be prioritized. For those outcomes which you feel are "not applicable," please rank as your lowest priorities.

_____ UMB leadership demonstrates their commitment to the Core Values and expects fellow leadership, faculty, staff, and students to hold the University's senior leaders accountable to those Core Values. (Theme 1, Outcome 1)

_____ UMB has a clearly articulated group of behavioral expectations related to each Core Value set to which faculty, staff, students, and University leaders are held accountable. (Theme 1, Outcome 2)

_____ UMB operationalizes the Core Values in each school and administrative unit through activities, including talent management, employee development and empowerment, and enhancements to student learning and experiences. (Theme 1, Outcome 3)

_____ UMB uses reliable quantitative and qualitative data to provide transparent metrics to demonstrate and document the University community's ongoing efforts at aligning behavior with the expectations inherent in our Core Values. (Theme 1, Outcome 4)

_____ UMB becomes a trusted partner and resource as we learn from the history of our own institution and further build relationships with our neighbors in West Baltimore and across Maryland. (Theme 2, Outcome 1)

_____ UMB honors, acknowledges, and values community sovereignty and the wisdom of our neighbors and actively integrates the knowledge, experience, and expertise of community members to measure and document the impact of UMB's health, legal, social, and economic development programs. (Theme 2, Outcome 2)

_____ UMB values and rewards teaching, research, and service that is grounded in community engagement as well as holds faculty, staff, and University leaders accountable for ethical and mutually beneficial community engagement practices. (Theme 2, Outcome 3)

_____ UMB develops, establishes, and maintains strategic partnerships between our seven schools, other USM institutions, and the University of Maryland Medical System to resource, coordinate, and support community initiatives that can become a local, regional and national model for others to replicate. (Theme 2, Outcome 4)

_____ UMB is committed to and promotes interdisciplinary, innovative, equitable, and sustainable solutions to domestic and global challenges. (Theme 3, Outcome 1)

_____ UMB provides students the opportunity and institutional support to engage in global learning. (Theme 3, Outcome 2)

_____ UMB expands University programs that value, support, and celebrate the richness and expertise of international students, scholars, faculty, and staff. (Theme 3, Outcome 3)

_____ UMB provides enhanced operational support and a knowledge platform with which the schools and functional units align their programs and processes to develop global collaborations, track global activities, and share successes. (Theme 3, Outcome 4)

_____ UMB nurtures an environment of research and discovery that probes and answers challenging questions, openly shares knowledge, and improves the human condition. (Theme 4, Outcome 1)

_____ UMB promotes the use of applicable new technologies and data-driven analytics, promoting student success, groundbreaking discoveries, employee productivity, and administrative effectiveness. (Theme 4, Outcome 2)

_____ UMB embraces a broad and collaborative culture encouraging the free exchange of ideas, acknowledging the importance of risk-taking for bold gains, and learning from failures and successes. (Theme 4, Outcome 3)

_____ UMB develops and implements anti-racist and anti-oppressive policies, practices, and programming that promote student well-being, belonging, and success. (Theme 5, Outcome 2)

_____ UMB is inclusive and actively seeks input from stakeholders at all levels and all backgrounds when identifying opportunities, planning and setting goals, and making decisions. (Theme 6, Outcome 1)

_____ UMB actively recruits, retains, supports, and advances diverse students, faculty, and staff, demonstrating a commitment to our Core Values of Equity and Justice. (Theme 6, Outcome 2)

_____ UMB provides professional and educational programs and initiatives that build capacity, equity, and respect, and support the well-being, sense of belonging, and success of all members of the University community. (Theme 6, Outcome 3)

_____ UMB communicates in a manner that is empowering, inclusive, and demonstrates cultural humility. (Theme 6, Outcome 4)

APPENDIX C

Administration and Finance Stakeholder Survey

Stakeholder Survey for Administration and Finance (A&F) Strategic Plan

Stakeholder Survey for the 2022-2026 Administration and Finance (A&F) Strategic Plan

Welcome to the stakeholder survey that will inform the 2022-2026 strategic plan for Administration and Finance (A&F). You are receiving this survey because you engage, on a regular basis, with one of more units within A&F. Several members of the A&F team have worked collaboratively to identify the themes and specific outcomes that we believe we can have the most impact.

This survey is designed to collect your opinion as to whether you agree that the outcomes we've identified are where A&F should focus our time and talents. Near the end of the survey, you are asked to give your opinion on the outcomes that we eliminated because we felt we could have little meaningful impact.

The survey should take about 15 minutes to complete. All responses are confidential. We value your opinion and appreciate your input. If you cannot offer an opinion on a particular question, please select N/A.

Thank you,

Dawn M. Rhodes, DBA

Please identify your position status:

- Faculty
 - Staff
 - Student
 - Contractor / other (not on UMB payroll)
-

Please identify your unit affiliation:

- Central Administration (HR, OCPA, Public Safety, OAA, etc.)
- Carey School of Law
- Graduate School
- School of Dentistry
- School of Medicine
- School of Nursing
- School of Pharmacy
- School of Social Work

For each Theme listed below, please identify your level of agreement as to whether YOU see this strategic outcome as an important one on which A&F should focus its time and talents.

Theme 1: Accountability and Integration of Core Values

Objective: UMB will systematically integrate the Core Values into the organizational culture through education and demonstrated behaviors so that internal and external stakeholders clearly understand who we are as an organization and what we stand for.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
Outcome 1: UMB leadership demonstrates their commitment to the Core Values and expects fellow leadership, faculty, staff, and students to hold the University's senior leaders accountable to those Core Values.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB has a clearly articulated group of behavioral expectations related to each Core Value set to which faculty, staff, students, and University leaders are held accountable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB operationalizes the Core Values in each school and administrative unit through activities, including talent management, employee development and empowerment, and enhancements to student learning and experiences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB uses reliable quantitative and qualitative data to provide transparent metrics to demonstrate and document the University community's ongoing efforts at aligning behavior with the expectations inherent in our Core Values.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 1: Please provide additional thoughts relating to the Accountability and Integration of Core Values theme that Administration and Finance should consider when formulating strategic goals.

Theme 2: Community Partnership and Collaboration

Objective: UMB will formalize and embrace a university-wide approach to community engagement and scholarship that fosters inclusive and equitable partnerships with our neighbors.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
Outcome 1: UMB becomes a trusted partner and resource as we learn from the history of our own institution and further build relationships with our neighbors in West Baltimore and across Maryland.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB honors, acknowledges, and values community sovereignty and the wisdom of our neighbors and actively integrates the knowledge, experience, and expertise of community members to measure and document the impact of UMB’s health, legal, social, and economic development programs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB develops, establishes, and maintains strategic partnerships between our seven schools, other USM institutions, and the University of Maryland Medical System to resource, coordinate, and support community initiatives that can become a local, regional and national model for others to replicate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 2: Please provide additional thoughts relating to the Community Partnership and Collaboration theme that Administration and Finance should consider when formulating strategic goals.

Theme 3: Global Engagement and Education

Objective: UMB will enhance its impact and reputation as a globally-engaged institution committed to improving the human condition through engagement, education, and research.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
Outcome 1: UMB is committed to and promotes interdisciplinary, innovative, equitable, and sustainable solutions to domestic and global challenges.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB provides enhanced operational support and a knowledge platform with which the schools and functional units align their programs and processes to develop global collaborations, track global activities, and share successes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 3: Please provide additional thoughts relating to the Global Engagement and Education theme that Administration and Finance should consider when formulating strategic goals.

Theme 4: Innovation and Reimagination

Objective: UMB will foster an agile, creative, and risk-tolerant learning environment, boldly capitalizing on new opportunities, technologies, and the power of collaboration to discover meaningful solutions to the complex problems impacting UMB, its Schools, and its strategic partners, and communities.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
Outcome 2: UMB promotes the use of applicable new technologies and data-driven analytics, promoting student success, groundbreaking discoveries, employee productivity, and administrative effectiveness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB embraces a broad and collaborative culture encouraging the free exchange of ideas, acknowledging the importance of risk-taking for bold gains, and learning from failures and successes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 4: Please provide additional thoughts relating to the Innovation and Reimagination theme that Administration and Finance should consider when formulating strategic goals.

Theme 5: Student Growth and Success

Objective: UMB will design and implement collaborative, inclusive, respectful, and accessible academic learning environments that equitably support and develop students to become exemplary professionals and purposeful contributors to society.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
Outcome 2: UMB develops and implements anti-racist and anti-oppressive policies, practices, and programming that promote student well-being, belonging, and success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 5: Please provide additional thoughts relating to the Student Growth and Success theme that Administration and Finance should consider when formulating strategic goals.

Theme 6: University Culture, Engagement, and Belonging

Objective: UMB will create a sustainable, equitable, and inclusive culture of care that collaboratively engages and embraces all members of the University community, and the broader community, with respect and in a manner that fosters belonging, understanding, trust, and equity.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
Outcome 1: UMB is inclusive and actively seeks input from stakeholders at all levels and all backgrounds when identifying opportunities, planning and setting goals, and making decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 2: UMB actively recruits, retains, supports, and advances diverse students, faculty, and staff, demonstrating a commitment to our Core Values of Equity and Justice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 3: UMB provides professional and educational programs and initiatives that build capacity, equity, and respect, and support the well-being, sense of belonging, and success of all members of the University community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcome 4: UMB communicates in a manner that is empowering, inclusive, and demonstrates cultural humility.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Theme 6: Please provide additional thoughts relating to the University Culture, Engagement, and Belonging theme that Administration and Finance should consider when formulating strategic goals.

Now, we'd like to ask you to review each of the strategic outcomes that were NOT included in the earlier part of the survey. As with the previous survey section, we will ask to identify your level of agreement as to whether YOU see this strategic outcome as an important one on which A&F should focus its time and talents.

	Not At All Important	Slightly Important	Moderately Important	Very Important	Extremely Important	N/A
UMB values and rewards teaching, research, and service that is grounded in community engagement as well as holds faculty, staff, and University leaders accountable for ethical and mutually beneficial community engagement practices. (Theme 2, Outcome 3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UMB provides students the opportunity and institutional support to engage in global learning. (Theme 3, Outcome 2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UMB expands University programs that value, support, and celebrate the richness and expertise of international students, scholars, faculty, and staff. (Theme 3, Outcome 3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UMB nurtures an environment of research and discovery that probes and answers challenging questions, openly shares knowledge, and improves the human condition. (Theme 4, Outcome 1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Finally, please provide additional thoughts related to anything that you think A&F should consider when formulating our 2022-2026 Strategic Plan.

APPENDIX D

Core Leadership – Guiding Principles Survey

A&F Core Leadership - Guiding Principles Survey

Administration and Finance
Core Leadership Guiding Principles Survey
Strategic Plan 2022-2026

Below are the updated Guiding Principle statements for the five paired definitions. Also included is a Preamble statement. Each of these is the culmination of the collaborative work over the course of several strategic planning meetings. We would like to stop word-smithing. We are asking for your reaction to what is being presented as a final version. If you feel that the statement is acceptable enough and that you could commit to the language, then we ask that you select "yes." On the other hand, if you find yourself unable to live with the statement, then we ask that you select "no." This survey should take approximately 5 minutes to complete.

Please indicate your agreement - yes or no - to the language proposed.

	Yes	No
<p><u>Preamble</u>: As a team member of Administration and Finance at the University of Maryland, Baltimore I am committed to the following guiding principles. By living these guiding principles on a daily basis, I will contribute to making UMB an institution that we all can take pride in, one that generates job satisfaction, and one that will be better poised to improve the human condition and serve the public good.</p>	<input type="radio"/>	<input type="radio"/>
<p><u>W - Well-Being and Sustainability</u>: I will ensure that I am a good steward of resources by promoting the health and well-being of myself, society and the environment. I want to meet the needs of the present without compromising the future.</p>	<input type="radio"/>	<input type="radio"/>
<p><u>I - Innovation and Discovery</u>: I will learn, adapt, and reimagine processes that will drive creative change. I will take prudent risks to continuously discover more effective and efficient solutions to meet university goals. I am committed to communication and collaboration to break down silos.</p>	<input type="radio"/>	<input type="radio"/>
<p><u>S - Service Excellence and Accountability</u>: I will provide reliable and professional services to meet the needs of our University community. I will embrace a solutions-oriented approach one customer interaction at a time. I will take ownership of my mistakes and their implications.</p>	<input type="radio"/>	<input type="radio"/>
<p><u>E - Equity and Justice</u>: I will strive to foster a culture of inclusiveness, diversity, and fairness. I am committed to growing my knowledge of inequities and injustices. I will support equitable opportunities across our community.</p>	<input type="radio"/>	<input type="radio"/>
<p><u>R - Respect and Integrity</u>: I will treat everyone in a dignified and civil manner. I will listen to, value, and consider the opinions of others. I will strive to do the right thing, even in the face of adversity.</p>	<input type="radio"/>	<input type="radio"/>