

Corporate Controller Strategic Plan

Committee members

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Overall Themes

- Advancing Diversity, Equity and Inclusion
- Transforming the Workforce and Workplace
- Improving Resiliency Capability within the Corporate Controller's Office Organization
- Enhancing Organizational Excellence

Goals

1. Improve efforts to recruit and retain a diverse workforce within the Corporate Controller's Office with a focus on staff from historically underrepresented and marginalized backgrounds.
- This goal directly supports the theme of advancing diversity, equity & inclusion.
2. Improve workplace climate and staff retention through the development of clearly defined career path support tools.
- This goal directly supports the themes of advancing diversity, equity & inclusion, transforming the workforce and workplace and enhancing organizational excellence.
3. Investigate and analyze flexible work environments in order to increase organizational resiliency and expand potential recruitment opportunities.
- This goal directly supports the themes of improving resiliency capability within the Corporate Controller's Office organization and transforming the workforce and workplace.
4. Ensure the Penn State Enterprise Applications are understood, working effectively and utilizing best practices. Leverage and enhance existing enterprise systems within the university such as SIMBA, Business Intelligence (BI) reporting tools and other services and platforms to facilitate data informed management decision making.
- This goal directly supports the theme of enhancing organizational excellence and improving resiliency capability within the Corporate Controller's Office organization.

Objectives

➤ Goal 1 Objectives

- 1) Evaluate and assess existing recruitment efforts with attention to staff from historically underrepresented and marginalized backgrounds.
- 2) Review, reconsider and revise strategies and opportunities to increase the retention of staff from historically underrepresented and marginalized backgrounds.
- 3) Evaluate workplace climate regarding diversity, equity and inclusion and identify areas for improvement to increase the retention of staff from historically underrepresented and marginalized backgrounds.

➤ Goal 2 Objectives

- 1) Investigate and develop a structured career path process based on an employee's personal career destination and timeline that provides guidance to acquire the necessary qualifications for advancement. The development of such a process will not only enhance retention but also improve the capability of the organization to be resilient to change.
- 2) Provide sufficient resources to managers/supervisors throughout the F&B Organization (potentially the University) and coach them on how to assist employees on the development of their personal career paths.
- 3) Provide employees access to career path resources that will assist in focusing their efforts to expand and refine skills necessary for positions of higher responsibility and accountability within the Corporate Controller's Office.
- 4) Perform evaluations on a regular basis addressing employee movement, advancement, and workplace climate concerning career path opportunities throughout the F&B Organization (potentially University).

Objectives

➤ Goal 3 Objectives

- 1) Investigate the potential for increased flexible work environments, especially based on roles and identify 100% remote work opportunities to enhance the attractiveness of employment in the Corporate Controller's Office and increase the potential pool of candidates.
- 2) Improve the ability of the organization to adapt to unforeseen disasters that might affect the availability of physical locations as well as addressing the potential inability of individuals to work in proximity to one another. Distributed work locations could aid in mitigating the effect of such events by improving organizational resiliency.
- 3) Develop remote working procedures for temporary emergency situations for staff to help reduce burdens on operations and support the employee with a path to continue working when possible.

➤ Goal 4 Objectives

- 1) Provide a forum of communication between the Corporate Controller Office and SIMBA to evaluate the application user acceptance & experience.
- 2) Evaluate and recommend potential future enhancements to the SIMBA application and supporting reporting tool set.
- 3) Maintain awareness and involvement in development of overarching data management tools across the multiple PSU Enterprise Resource Planning (ERP) platforms; with the intention of creating cross functional reporting capabilities and customized reporting options.
- 4) Develop a community of practice for users to connect and discuss best business practices focused on internal customers.
- 5) Increase understanding of data structures and definitions in order to better leverage reporting capabilities for improved depth and quality of decision-making resources.
- 6) Support the development of documentation and data definition libraries to ensure data elements are well understood.

Key Performance Indicators (KPI)

➤ Goal 1 KPIs

1. Analyze existing Diversity, Equity & Inclusion (DE&I) data within the Corporate Controller's Office (including breakdown by manager/non-manager).
2. Establish group to analyze recruitment and retention policies such as search committee training requirements and onboarding procedures.
3. Establish/conduct small focus groups with facilitators external to the Corporate Controller's Office.
4. Track/analyze retention based on movement outside of the Corporate Controller's Office.
5. Increase diversity by percentage aligned with Finance and Business (F&B) diversity goals.

➤ Goal 2 KPIs

1. Confirmation of a structured career path process that clearly identifies the steps and estimated timeline involved for an employee to meet specific destination positions.
2. Confirmation of the number of supervisory staff throughout the F&B Organization (potentially the University) have the necessary skillset and are available to assist staff in the development of their career path goals and how to achieve them.
3. Confirmation of the availability of an online resource for employees which enables them to identify opportunities within the F&B Organization (potentially the University) and instructions/tools on how to pursue their chosen career path.
4. Confirmation there is employee movement, advancement, and a positive workplace climate concerning career path opportunities throughout the F&B Organization (potentially University). Examples include average length of employment.

➤ **Goal 3 KPIs**

1. Identify roles within departments that may be appropriate for flexible work environments up to and including 100% remote capability.
2. Departments reassess Continuity of Operations Plan (COOP)/Disaster Recovery (DR) plans to incorporate new flexible work environment factors.
3. Departments deliver individual emergency situations solution/option plan.

➤ **Goal 4 KPIs**

1. Establishment of a community of practice/forum.
2. Receive feedback/participation from user awareness surveys.
3. Receive feedback/participation from user adoption/utilization surveys.
4. Institute enhancements based on improved capabilities within the PSU Enterprise solutions.
5. Data definitions documented and available to users.