



WAYNE STATE UNIVERSITY

Distinctively Wayne State University Strategic Plan 2016-21 Update

Financial Sustainability and Operational Excellence

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Preamble

We commit to growing revenue and increasing the efficiency and effectiveness of business processes in order to provide adequate resources to support the university's mission while maintaining a value-based tuition structure.

- 5 Goals
- 20 Objectives
- 46 Initiatives completed or in progress (to-date)



Goals

1. Increase Enrollment
2. Develop a Culture of Philanthropy Throughout the University Community
3. Diversify and Enhance Sources of Revenue
4. Achieve Operational Excellence in All Processes
5. Ensure Environmental Sustainability



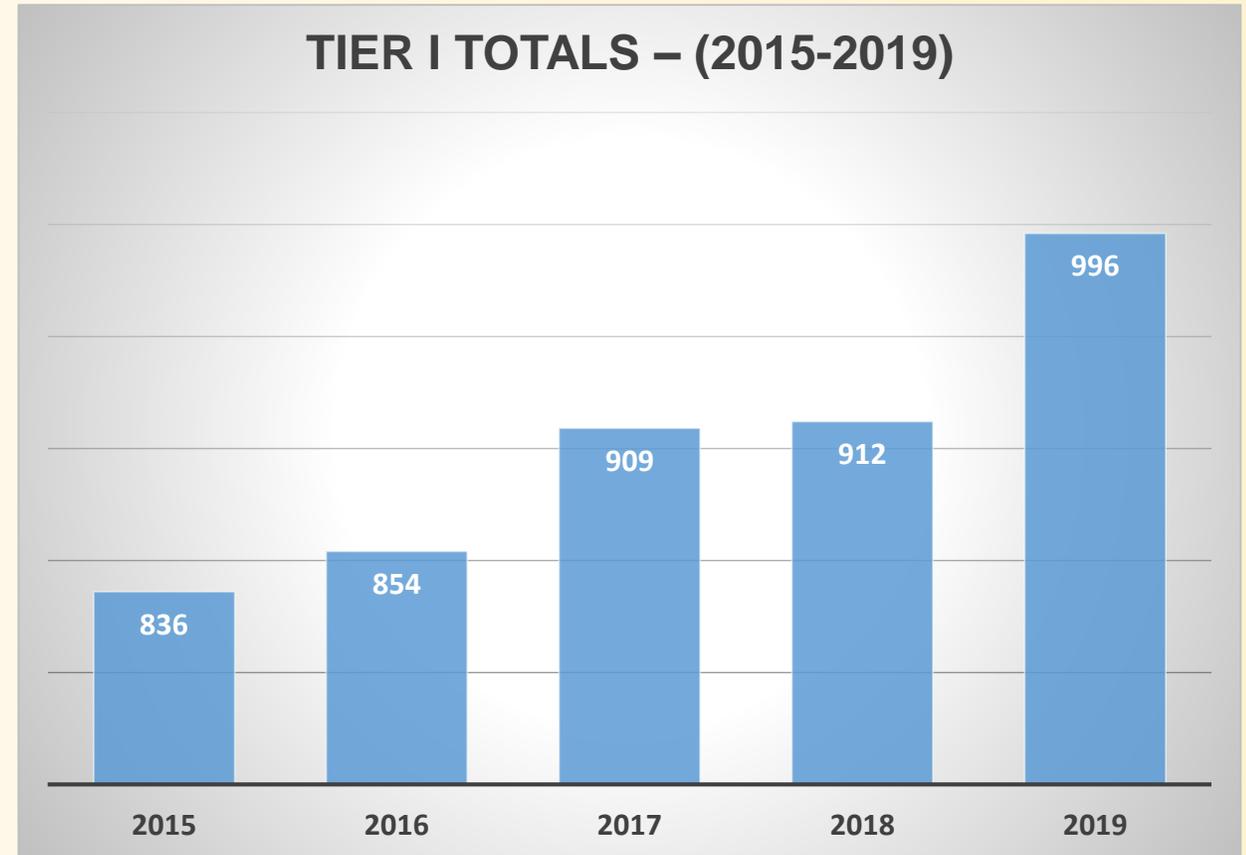
Goal #1

Increase Enrollment



Public Relations Engagement

- Proactive public relations outreach to support WSU's mission.
 - Strong focus on academic programs, research, student success and community commitments.
 - Tier I media coverage increased 9% from 2018-19
 - Since 2017, WSU's partnership with the Conversation has showcased 45 faculty experts in 204 publications with 2.9 million reads



University Brand Campaign, “Warrior Strong”

- “Warrior Strong” brand campaign launched in Oct. 2017
- Influencer tracking study shows positive improvements
 - Measurements for individuals likely to recommend WSU in the Detroit DMA moved to 66% in 2019 (63% in 2017); those likely to recommend WSU in the Flint, Grand Rapids and Lansing DMA increased to 52% (up from 41% in 2017) (Source: WSU Influencer Tracking Study 2019)
 - WSU opinion in the Detroit DMA remained steady; Opinion in Flint, Grand Rapids and Lansing increased over 2017
- Social media support for the marketing campaign remains strong
 - 2019 followers up 5% with a reach of 9.5 million, nearly 500,000 interactions



WSU Brand Identity and Licensing Program

- New brand identity launched in Oct 2017
- Implemented new internal licensing policy to increase quality and accessibility of WSU branded merchandise
- Campus focused licensing promotions are engaging students and showcasing WSU pride
 - Warrior Wednesday's Rewards/Violations
 - Warrior's Favorite Things – Instagram promotion (522 unique participants; 35,000 impressions)
 - Trade Your Tee
 - Warrior Madness
- 2019 licensing sales increased 33% from 2018



Unique Campus Experiences: On-campus and Virtual

- Created campus events for local students and teachers to interact on campus with WSU faculty experts in a variety of academic disciplines
 - 1,212 high school students attended the 2019 AP Day event; 460 extended campus tours
 - 2,067 sixth – ninth grade students and chaperones attended STEM Day 2019, represented 35 Detroit area schools; 85 sessions, 903 extended campus tours
- Created a web based virtual tour experience with 4,500 visitors Jan. – Sept. 2019; Average time on site: 10:54 minutes
- WSU Insiders and Knowledge on Tap provide faculty, staff and community members an opportunity to learn more about WSU's academic offerings and create university ambassadors



Goal #2

Develop a Culture of Philanthropy
Throughout the University
Community



Objective: Achieve the \$750 million capital campaign goal, including \$187.5 million in new endowment funds.

- Achieved 103.5% of \$750 million goal, with \$776.5 million raised
- \$199 million raised during the campaign to support endowment funds
 - Outstanding cash pledges balance = \$19.9 million*
 - Yet-to-be realized planned gift balance = \$100.2 million*



**Balances as of October 31, 2019*

Objective: Increase involvement of students, faculty, administrators and alumni in philanthropy.

Alumni Giving during Pivotal Moments:

- \$226,189,314
- 192,858 new gifts and pledges from alumni

Faculty & Staff Giving during Pivotal Moments:

- \$45,471,529
- 25,867 new gifts and pledges from WSU faculty & staff



Objective: Increase involvement of students, faculty, administrators and alumni in philanthropy.

- **WSU Giving Day**
 - ✓ Launched in 2017; university-wide; significant growth from year to year
- **Inspire from Within**
 - ✓ F/S giving campaign rebranded in FY17
 - ✓ Increased F/S giving participation rate from 8% in FY17 to 24% in FY18
- **Corporate & Foundation Relations Internal Outreach**
 - ✓ ~400 meetings annually with faculty and academic leadership
- **Student Engagement Initiatives**
 - ✓ Student-Alumni Council; WarriorFunder crowdfunding; Pay It Forward Challenge



Objective: Steward the investments that are made by donors.

- Broad-based Donor Relations Framework Established
 - ✓ Thank-you letter program; giving societies; personalized stewardship plans
- Annual Donor Reporting
 - ✓ Personalized impact reports; ~150 grant reports annually; ad hoc donor reports as needed
- New Donor Engagement Programs
 - ✓ Wayne Loyal (and its Lifetime Circle)
 - ✓ Investors Forum
 - ✓ Specialized, targeted engagement events



Goal #3

Diversify and Enhance Sources of Revenue



Enhance the Position of WSU in the State Performance Funding Formula

Successfully advocated for the implementation of the PELL metric, which has produced over \$1M additional revenue to the university since its implementation; additional revenue enhancement efforts underway for upcoming state budget cycle.



Increase Return on Cash and Grow the Endowment

Increase Return on Cash Pool

- Revised Cash Pool asset allocation to include incremental asset classes with the objective to generate income to support the budget, protect principal, maintain sufficient liquidity to support operations, and add incremental returns to grow the portfolio.
 - Received BOG approval September 2018 for revised asset allocation and opportunistically transitioned to new allocation throughout FY 2019.
- First year performance results* are positive:

	1 Year (FYTD)	3 Year	5 Year
September 30, 2019	4.8%	2.2%	2.4%
September 30, 2018	0.2%	1.9%	2.0%

Grow the Endowment

- Moved to new OCIO model October 2016 and implemented new asset allocation and reinvested returns with the goal to grow the portfolio.
 - Portfolio has increased from \$311M to \$398M (March 2017 – September 2019)



* Net of fees

Goal #4

Achieve Operational Excellence in All Processes



Create a Culture of Service Through Continuous Quality Improvement (CQI)

- Introduced CQI to FBO in April 2018
- Completed first phase of introductory education for staff and leaders - August 2018.
- Trained 6-Sigma Black & Green belts; support seven cross functional projects to date.
- 6-Sigma trained facilitators support all Banner 9 implementation teams
- Initiating 2nd phase of CQI training to equip FBO leaders with the knowledge and tools to conduct process improvement work in their departments.
- Launched CQI web page, published a quarterly CQI Newsletter; implementing a Community of Practice as a mechanism to share information and experiences; and developing a CQI dashboard to monitor the impact of process improvements.
- In support of the RCM initiative, implemented a review process for non-revenue generating (NGU) units throughout WSU to assess quality, efficiency and effectiveness of services.



Develop and Implement a University Support Unit Assessment Process

- At the request of leadership across the Schools/Colleges, a structured process for evaluating programs/services, quality, efficiency and effectiveness of non-revenue generating units was developed and implemented. The program is titled Administrative Unit Review (AUR) process.
 - Foster a climate of ongoing improvement
 - Incorporates stakeholder input
 - Department receives feedback and recommendations from external reviewers
 - Identify potential opportunities for improvement
 - Department will implement an improvement plan with support of AUR Steering Committee
- Pilot assessment of Customer Services department within C&IT successfully completed.



Campus Master Plan

- Project initiated in July 2018 with consultant (Dumont Janks)
- Master plan strategies completed August 2019
- Strategies vetted by faculty, students and community representatives
- Master plan approved by BOG in June 2019
- Formal public launch targeted for November 2019
- Master plan will be published, posted and distributed November 2019



Develop & Strengthen FBO and BAO Partnership

- Goal: To improve operational efficiency and effectiveness and achieve excellence in business processes and improve financial controls across the University.
 - Recognizes the decentralized role which Business Affairs Officers (BAOs) play in supporting financial and budgetary efficiency, effectiveness and internal control
- Focus on engaging the BAOs in communication, process improvement initiatives and training
 - Increasing FBO involvement in the monthly BAO Group meetings
 - Ensuring BAO representation on key projects including Banner 9 and RCM
 - Launching related process improvement and financial control initiatives in which the BAOs are to be engaged:
 - Routine financial and budgetary report development
 - Administrative policy review and revision
 - Financial Sub-Certification process development and implementation



Develop RCM Based Budget Model for University-Wide Usage

- Multi-year initiative to move to a decentralized budgeting approach that transitions more budget authority to the individual schools, colleges, and divisions.
 - Project involved more than 60 members of the WSU community
- After the initial pro forma was completed, educational presentations were made for schools/colleges, Academic Senate, Business Affairs Officers, etc. beginning October 2018.
- Following the release of the pro forma, feedback from stakeholders was reviewed, considered and factored into updates to the model.
- Development of the model was finalized in 2019, and FY 2020 budgets for each school/college were prepared for training/education opportunities using the principles of the new model.
- Finance met again with some key stakeholders in early FY 2020 to review the finalized model.
- Training and readiness efforts are on-track in preparation for the FY 2021 go-live.
- Focus is to ensure that staff in critical roles are both trained and have the data needed to make data-informed decisions.



Data-Informed Decision Making Initiative

- Collaborative effort led by Institutional Effectiveness
- Launched EAB Academic Performance Solutions
 - Detailed analytics and metrics on program portfolio enrollment trends, instructional resource allocation and program-level student success.
- Complete redesign and launch of WSU data dashboards using Microsoft PowerBI
- Data Governance initiative



Banner Reimplementation Project



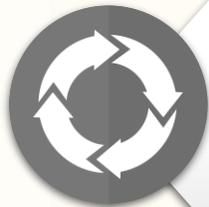
State of the Art Technology

- Implement Banner 9 administrative pages
- Enhance self-service environment
- Review and convert to baseline Banner 9 system functionalities or employ an approach that is cost effective and results in improved efficiencies.



Increase Productivity

- Enhanced processes
- Operational efficiencies
- Minimizing manual processes and data entry
- Eliminating redundant, non-value added steps



Review Prioritized Business Processes

- Streamline
- Incorporate best practices
- Incorporate appropriate internal controls





Operational Efficiencies

- Improved accuracy for year-end reconciliation
- Improved timeliness of data feed from student A/R to accounting & finance
- Increased federal compliance
- Reduced amount of manual review needed
- Reduced # of aid adjustments

- Increased accuracy of student budget projections & refunds
- Reduced process runtime 4-6 hrs / week
- Process automation saves approximately 16 hrs / week

- Enhancements reduced need for advisor and help email
- Student funding availability information received sooner
- Eliminated unstable custom class scheduler
- Improved error handling during registration
- Efficient linked course registration





Completed Milestones

2017

- Record Locking for ISIR/Subsequent
- New Year Roll, Data Load & Tracking Process Review
- Common Matching Process Review

2018

- Banner 9 Upgrade: Admin. Pages
- Registration Upgrade
- Class Scheduler
- Clarified Error Messages
- New Registrar Website
- Slate Implementation
- TD Client: Process Automation Implementation
- Application of Payments Rules Review
- Spring/Summer Processing
- Period Based Budgeting-Review of Rules
- Review Algorithmic Rules and implement
- Period Based Awarding/Average Cost per College Budget
- Banner 9 Benefits Forms
- Subset of Draft Chart of Accounts & Impact Assessment

2019

- Medical School Records/Registration Process Analysis
- Fee Assessments Analysis
- Admissions Application Process Review
- Slate Implementation & Data Transfer
- 1098-T Upgrade
- Tuition Assistance Re-engineering
- Student Direct Deposit





Going Forward

- Finance Self-Service
- Restructured Chart of Accounts
- Impacted System Updates
- Security Updates
- HR Impact Updates
- Procurement Updates

- Online Graduation Application
- FOAPAL Crosswalk
- Finance Policies Review/Updates
- CPoS (Courses for Program of Study)

- Wait listing
- Mobile Registration
- Banner Communication Manager
- Action Items
- Proxy Access
- BAO Chart Clean-up
- Chart Modeling

2021

2020

2019



Goal #5

Ensure Environmental Sustainability



2018 Sustainability Highlights

Greenhouse Gas Inventory

Reduce greenhouse gas emissions from Wayne State University by 25% below 2014 average levels by 2022.

Establish a multi-pronged plan for energy innovation, energy conservation measures, alternative energy and reducing the University's carbon footprint.



Collected Carbon Emissions at WSU



Commuting Survey

Modes of Transportation

	Drive Alone	Bike	Carpool	Commuter Rail	Light Rail	Public Bus	Walk
Students	76%	2%	7%	0%	0%	3%	12%
Faculty	88%	1%	7%	0%	0%	1%	4%
Staff	87%	1%	6%	1%	0%	2%	3%

Student Commuting

Mode	Avg Miles/Trip
Drive Alone	16.8
Bike	2.5
Carpool	13.8
Commuter Rail	7.0
Light Rail	-
Public Bus	6.5
Walk	2.0

Faculty Commuting

Mode	Avg Miles/Trip
Drive Alone	17.1
Bike	2.5
Carpool	15.0
Commuter Rail	-
Light Rail	-
Public Bus	8.8
Walk	2.0

Staff Commuting

Mode	Avg Miles/Trip
Drive Alone	16.2
Bike	3.1
Carpool	13.2
Commuter Rail	2.5
Light Rail	-
Public Bus	11.3
Walk	3.1

2018 Sustainability Highlights

Waste Reduction & Recycling

GOALS:

- Increase understanding of recycling and WSU's recycling process
- Increase confidence in recycling
- Increase participation in the campus program

Campus collaborative involving WSU Student Organizations, Sustainability Office, Custodial Services, and volunteers, and Green Living Science.

These goals will be achieved through:

- Education
- Training
- Communication
- Process Improvement
- Reporting/Transparency



Discussion

