Unit Goals: DFA Program Development & Execution

Goal	Key Metrics/Milestones	Goal Drivers	Status
Goal 1: Develop a recommendation for the creation of a DFA Business Office to include the current DFA Budget and Finance unit, the DFA Business Services unit, and any additional identified functional activities for appropriate centralization. *(FY24 – FY26)* **P4 – DFA-A**	• Tracking improved time and resources saved through standardized business processes.	• Need for organization of administrative activities after re-org of functions. • Opportunity for reviewing functions for efficiency and improvements. • Provide support for smaller units/depts that do not have dedicated admin/business support.	• With 3 employees in Bus Svcs unit and one just resigned, figuring out what activities to stop / start / continue.
Goal 2: Develop financial/budget reporting tool (transition from Adaptive). *(FY24 – FY24)* **P4 – DFA-A**	• Department heads sign off on monthly reports.	• Transitioning away from Adaptive aligns with the Budget Office's vision for future budgeting tools. • Development of a revised BVA report to include reconciliation improves controls and reduces risk. • Using excel for reports, data pulled from KFS Decision Support and ensuring data ties to Anteater Financials.	• Still much work to do to adjust budgets in KFS and align with the excel reports. • Development will continue into FY25.
Goal 3: Develop/define annual budget process for DFA departments, including timelines/deadlines and budget planning assumptions for both revenue and expense updated quarterly. *(FY24 – FY24)* **P4 – DFA-A**	• Submit to Budget Office by deadline of 5/17/24.	• Develop a process to build an all-funds, consolidated budget for DFA to budget for sources and uses. • Improve communication and expectations for planning, reporting, and managing. • Identify opportunities and vulnerabilities in operations to make better resource decisions and service level adjustments at department level, so that expenses align with available resources.	• Still much work to do to properly allocate resources, such as BENF, to core funded units. KFS budgets need to be adjusted for current expectations. Multiple supporting schedules need to be developed.
Goal 4: Review and document the recharge process for all of DFA. *(FY24 – FY25)* **P4 – DFA-A**	• Recharge account surplus/deficit is within 60 days +/- operating expenses. • Recharge rate packages are approved by Recharge Rate Committee.	• Came out of conversation with Organizational Consultant – DFA Budget / Finance to work with Controller's Office.	

Unit Goals: DFA Program Development & Execution (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
Goal 5: Assess and refine a minimum of one key operational process within each team annually to drive ongoing improvements. *(FY24 – FY28)* **P4 – DFA-A**	• Number of processes documented and improved: One process per team per year. • Inventory of process flow maps: One process per team per year should have a process map. • Use of process improvement tools to reduce waste: One process improvement tool per process.	• Step one in process improvement is documenting current state business processes. • Identify top process(es) in each PDE unit and document at least one per year going forward.	• In progress
Goal 6: Expand DFA IT function scope and authority, transitioning from a consulting role to providing assurance that proposed IT investments are aligned to highest DFA priorities.). *(FY24 – FY28)* **P4 – DFA-A**	• Number of IT projects started without approval. • % of projects on the roadmap that with committed funding and resources. • Number of DFA units not attended quarterly review meeting.	• Inconsistent behavior by DFA departments based on funding. • Less than ideal communication between departments on technology projects bypassing opportunities for collaboration. • Implement better controls for both cost and for DFA IT Strategy.	
Goal 7: Improve Procurement End-to-End Processes. *(FY24 – FY25)* **P4 – DFA-A**	• Number of purchasing escalations per month. • % survey responses with highly satisfied with purchasing. • % POs aging > 30 days. • Number of POs processed per buyer.	• Numerous customer complaints. • Common misunderstanding throughout campus of multi-step processes.	
Goal 8: Develop infrastructure to support continuous process improvement activities for DFA. *(FY24 – FY25)* **P4 – DFA-A**	• Number of CPI tools and workshops. • Use of Intake Form. • Completion and use of PM toolkit. • Completion of Intake and PM flowcharts.	• Consider effort invested in improvements as compared to actual savings realized – try to quantify improvements.	