



Finance & Administration

FY2026 Workplace Effectiveness & Experience Action Plan

“Working Better, Together: Empowering Culture, Connection, and Innovation”

Introduction

Dartmouth Finance is committed to cultivating a high-performing, people-centered culture rooted in excellence and collaboration. In FY 2026, we are expanding our organizational effectiveness model to further integrate people, systems, and culture – ensuring we deliver even greater value to the Dartmouth community.

Utilizing best practices in leadership and staff development, organizational design, employee engagement, and decision-making, we aim to create an environment where every Finance team member is empowered, valued, and equipped for success.

Mission Alignment

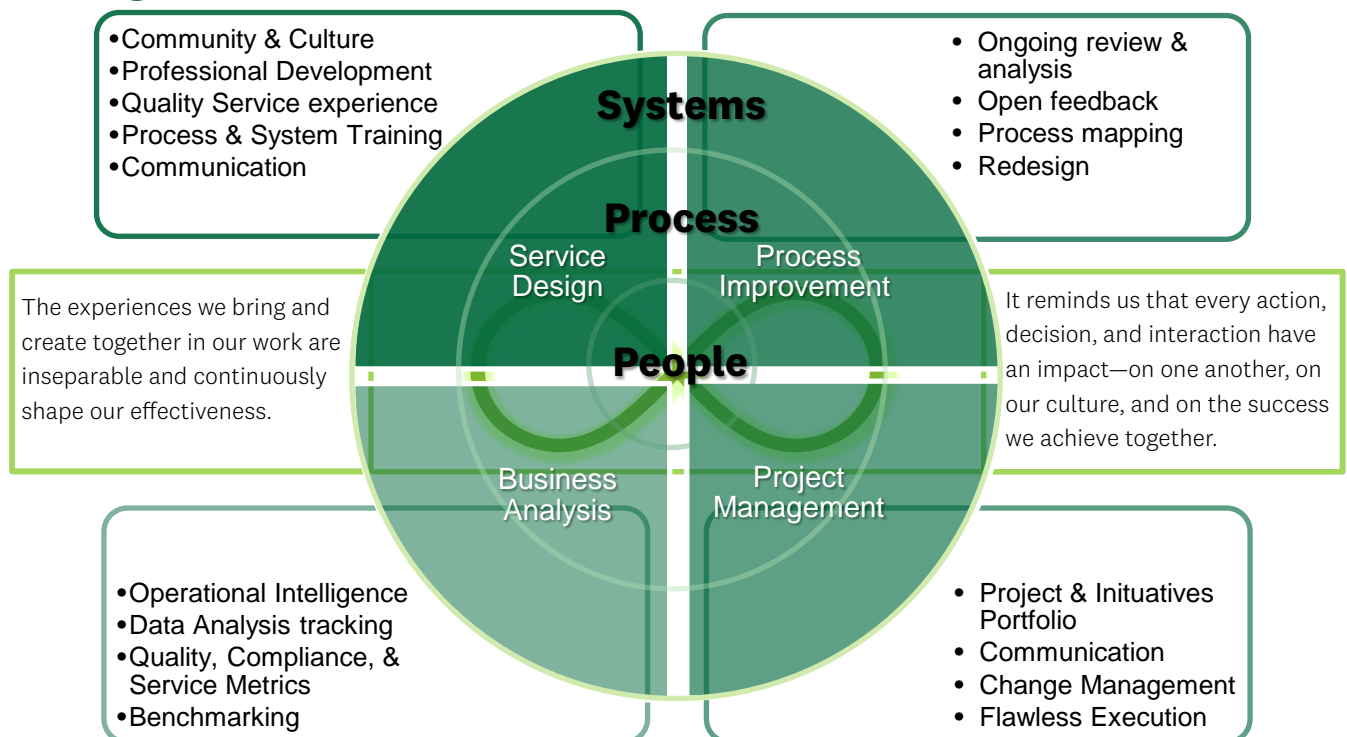
Finance Mission:

We efficiently deliver high-quality services and information, when and where they are needed, to enable the dynamic aspirations of Dartmouth’s faculty, students, and staff.

Workplace Effectiveness & Experience Vision Statement:

To be a high-functioning organization where all people, processes, and culture align seamlessly with Dartmouth Finance’s core values of collaboration, integrity, innovation, and efficiency.

Finance Organizational Effectiveness



Strategic Anchors of Workplace Effectiveness & Experience

| Pillar | Goal | Finance Approach |
|------------------------------|--|--|
| Strategy & Governance | Align organizational effectiveness with Dartmouth’s strategic priorities | Embed principles of collaboration, clarity, and service excellence into mission, policies, and plans |
| Leadership & Culture | Build emotionally intelligent, trust, and a strong connected culture. | Promote continuous discussions about culture and professional development opportunities. |
| Organizational Design | Ensure transparent systems, clear processes, and effective policies and decision-making structures | Ensure workgroups include representatives from affected roles and responsibilities to verify that policies, processes, and systems are efficient and effective for everyone. |
| Talent & Development | Attract, grow, and retain top talent | Optimize recruitment processes; prioritize ongoing professional development; encourage leadership across all tiers. |
| Measurement & Accountability | Measure outcomes that matter and adjust accordingly | Track key engagement indicators, participation levels, and operational improvements |

Key Strengths

Dartmouth Finance’s greatest asset is our people. By reinforcing our foundational principles and strengthening continuous improvement across people, processes, and systems, we aim to achieve the following outcomes:

- Higher levels of staff empowerment and engagement.
- Increased customer satisfaction across Finance services.
- Improved retention and broader appeal to top talent.
- Streamline processes that reduce inefficiencies and enhance outcomes.

Benefits to the Organization



FY2026 Goals & Outcomes Alignment

Organization Goals

- 1. Promote Financial Integrity and Transparency
 - Ensure appropriate compliance in the areas that we oversee
 - Enable collaborative planning and decision making through excellence in reporting and analytics
- 2. Provide Exceptional Service
 - Encourage collaboration, standardization and support across Dartmouth
 - Embrace new technologies that drive efficiencies and collaboration
- 3. Develop Highly Functional Team
 - Support continuous improvement by focusing on learning, development, and improving processes and performance
 - Develop our workforce to support evolving needs and requirements
 - Reinforce and strengthen our commitment to culture and community

Workforce Effectiveness & Experience Goals

- 1. Higher levels of staff empowerment and engagement
 - Encouraging staff to take initiative & innovate
 - Providing opportunities for professional growth
- 2. Increased customer satisfaction across Finance services
 - Enhancing service quality
 - Improving response times
- 3. Improved retention and broader appeal to top talent
 - Creating a supportive work environment
 - Offering competitive benefits
- 4. Commitment to a high-performing, people-centered culture
 - Focusing on excellence and collaboration
 - Expansion of organizational effectiveness model

Core FY 2026 Activities

| Initiative | Purpose | Frequency | Owner(s) |
|---------------------------|---|-------------|------------------------|
| WBT Discussions | Monthly engagement discussions | Monthly | WBT Steering Committee |
| WBT Book Club | Shared learning through curated readings | Quarterly | WBT Steering Committee |
| Culture Awareness Program | Colleagues’ storytelling and team-building activities | 2x Annually | WBT Steering Committee |

| Initiative | Purpose | Frequency | Owner(s) |
|--|--|------------------|--|
| Enhanced Communication Plan Implementation | Implementation of communication practices and expectations | Summer 2025 | WBT Steering Committee |
| Professional Development Resources Implementation | Implementation of PD Resources to provide increased clarity and access to learning opportunities | Summer 2025 | WBT Steering Committee |
| Staff Recognition Implementation | Implementation of recognition program to celebrate staff contributions and growth Phase I Implementation Summer 2025; Phase II January 2026 | Summer 2025 | Employee Recognition Committee |
| Community of Interest Groups | Continue to build informal connection spaces across Finance | Ad hoc | Staff-led, supported by WBT Steering Committee |

Measuring Impact

| Area | Quantitative Indicators | Qualitative Indicators |
|---|--|--|
| WBT Discussions & Professional Learning | Participation rates, # of sessions | Staff feedback and reflection on learning and growth |
| Workforce Engagement | Survey response rates, engagement scores, retention data | Open-ended feedback on workplace experience |
| Communications Improvement | Usage of recommended tools, survey metrics | Narrative feedback on transparency and clarity |
| Community Engagement | # and professional demographic of groups formed (Division/Dept/Position) | Observed collaboration, team satisfaction |

Call to Action: Your Role in Working Better, Together (WBT)

Every member of Dartmouth Finance is a leader in strengthening organizational effectiveness and engagement. You can help drive our shared success by:

- Actively participating in WBT discussions, learning and connection opportunities
- Providing feedback during forums and surveys
- Engaging in working groups and community initiatives

- Applying emotional intelligence, teamwork, and service principles to your daily work and interactions

Working Better, Together:

- WE are Ethical
- WE are Efficient
- WE are Emotionally Intelligent
- WE are Effective
- WE Enhance
- WE Empower
- WE Engage
- WE Value Every Experience

Together, we can build a Finance division that works better *because* it works for everyone.