

SACRAMENTO STATE
ADMINISTRATION & BUSINESS AFFAIRS FAMILIES
2007/08 GOALS & MEASURES PROGRESS REPORT
DESTINATION 2010
4TH QUARTER

BUSINESS AND ADMINISTRATIVE SERVICES FAMILY

Strategic Planning & Quality Improvement

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
People	Build a Welcoming Campus	Support an engaged workforce	Increase understanding of ABA's strategic plan (Balanced Scorecard and Strategy Map) among division staff <ul style="list-style-type: none"> • Provide informational training to expanded START group • Work with START to identify effective methods to increase understanding level amongst staff 	6/30	Implement survey at Staff Professional meeting in fall 2007; survey again in fall 2008	%100 <ul style="list-style-type: none"> ▪ SPQI has begun initial process Improvement training for START and plans to complete training in July ▪ START's proposal to the D2010 Leadership Council to introduce process improvement and LEAN concepts to ABA Staff professionals and process mapping concepts to ABA Management Council was accepted. ▪ START has outlined plans for delivery of presentation to both groups in the fall. ▪ Staff professionals will be surveyed again in the fall to assess efforts to increase understanding.
People	Build a Welcoming Campus	Support an engaged workforce	Increase participation in recognition programs (carry over goal from 06/07): <ul style="list-style-type: none"> • Work with START to review processes and get staff input for program improvement • Add team award to the Winter Awards process 	6/30	<ul style="list-style-type: none"> • Number of nominations compared to prior years' data • Number of team nominations (gather baseline data this year) 	%100 <ul style="list-style-type: none"> ▪ START involvement and promotion of the Staff Peer Award Program resulted in increased participation: <ul style="list-style-type: none"> ○ 43 nominations submitted in 2007/2008 compared to 34 in 2006/07, or an increase of 21 percent. ○ Seven nominations for newly developed Team Award in 2007/08
Processes	Build a Welcoming Campus	Build trust between ABA and our constituents	Implement PBViews as ABA's data assessment tool: <ul style="list-style-type: none"> • SPQI Director and Analyst to attend training • Enter existing data into PBViews and review with LC at quarterly meetings 	6/30	Successfully set up measures and data for 07/08 goals in PBViews and review with Leadership Council	20% <ul style="list-style-type: none"> ▪ Director and QI Assistant attended System Administrator training. ▪ Goal postponed due to workload issues.

ADMINISTRATIVE SERVICES

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Processes		(a) Providing one more convenience to the	Enhance service delivery to the campus: (a) Install new daily parking permit	6/08	(a) When the machines are installed and credit card	Reprographics –20% Upgrades to Digital StoreFront were implemented and staff trained. This is the web-based job submission

		<p>campus to making it easier to use the parking permit machines.</p> <p>(b) Providing one more convenience to faculty staff and students to use their Sac State OneCard.</p> <p>(c) Better tracking of service for the users, and better service management for the Photocopy administration.</p>	<p>machines with credit card capability in parking lots around the campus.</p> <p>(b) Implement online credit card deposits to OneCard using Cashnet. This is a continuing goal from 06/07 that was not accomplished because the software company did not release upgraded version of the software as announced.</p> <p>(c) Implement the HEAT call ticket system to track all service calls for Photocopy Services.</p>		<p>access is available.</p> <p>(b) When credit card deposits are available to the OneCard holders</p> <p>(c) When the system has been installed and the campus has been trained in its use.</p>	<p>program that will enable campus customers to submit their copy and printing jobs online. Beta testing with select groups on campus will begin later this summer with full implementation expected by the end of the calendar year.</p> <p>Photocopy and UTAPS – 80% implement capability to use credit cards in Shelby parking permit machines. Currently in test phase with goal to have operational before fall semester begins.</p> <p>OneCard – 75% Implement capability to make online deposits to card through Cashnet. A purchase order for this service has been established with Cashnet, and meetings have occurred with BIS and SFSC to establish process, with goal to have available for fall semester.</p> <p>Photocopy – 100% Implement HEAT system for photocopy service calls-complete</p>
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FACILITIES SERVICES FAMILY

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Customers	Build a welcoming campus	Become ambassadors of the campus, providing first-rate customer service	<ul style="list-style-type: none"> Conduct more training for customer service staff Continue with the data collection form the online survey 	6/08	<ul style="list-style-type: none"> Comparison of results with prior years Track training attendance of staff 	<p>100% Training</p> <ul style="list-style-type: none"> 220 FS employees attended mandatory sessions of a workshop called “Respect and Professionalism in the Workplace” which was presented by Jennifer Brown Shaw, Esq. on April 23 & 30, 2008 and May 2 & 20, 2008. All FS managers attended a similar session tailored for management and the issues they face. This session was also presented by Jennifer Brown Shaw on May 30, 2008. The goals for this workshop were: <ul style="list-style-type: none"> To ensure that our staff were aware of their rights as employees of the CSU system To clarify state law and CSU policies relating to personnel issues To highlight to the staff their importance in the University operations and the need for them to work well together at all times
Processes	Build a welcoming campus	Facilitate access to campus services	<ul style="list-style-type: none"> Update website with the latest information about the department and its services 	6/08	<ul style="list-style-type: none"> Publishing updated site on internet 	<ul style="list-style-type: none"> 100% the FS website now includes a link to the CSUS Sustainability website, which contains information on the University’s commitment to conservation and sustainable development 75% the FS website is now in the final phase of updates which will include adding more pages with relevant and up-to-date information, improving the “about” page for FS staff and removing all “under construction” pages. The goal is to make the site more user-friendly and to make information

						easier for any of our customers to find.
Processes	Build a welcoming Campus	Make the campus easy to navigate technologically and physically	<ul style="list-style-type: none"> Develop concept and design for "Way-Finder" sign system 	6/08	<ul style="list-style-type: none"> Complete final phase of the project 	100% FS completed the fourth and final phase of the Way-Finder project. The project took almost three years to complete at a cost of \$638,000
People	Build a welcoming Campus	Develop high employee morale	<ul style="list-style-type: none"> Employee recognition programs that award staff for excellent staff Staff appreciation activities such as BBQ, Golf Day, Aloha Week, Hat Day, Halloween and Admin Staff Day 	6/08	<ul style="list-style-type: none"> Survey responses to activities Collect suggestions on improving program 	100% Staff Appreciation Over the course of the year, FS held several morale boosting events. These included: <ul style="list-style-type: none"> Aloha Week the Holiday Lunch 2008 Hat Day, Rock T-shirt day, Favorite Team Cap Day, Sweatshirt Day the Halloween Potluck Golf tournaments: Veterans Day, Martin Luther King, Cesar Chavez were all held at the River Oaks Golf Course the Ice Cream Social 100% Employee Recognition Programs <ul style="list-style-type: none"> The Ninth Annual Facilities Services Golf Tournament which raises funds for staff recognition programs was held on June 7, 2008 at River Oaks Golf Course
Processes	Build a welcoming campus	Maintain the highest standards in financial and operational systems management	<ul style="list-style-type: none"> Budget development and management of resources Improving project accounting 	6/08	<ul style="list-style-type: none"> MMS Usage Log Improved project tracking 	100% Budget Development <ul style="list-style-type: none"> FS submitted the 2008-09 and 2009-10 preliminary budgets with several reductions. However, all the reductions impact supplies and services. We were able to avoid affecting the current staffing levels. Most of the impact will be limited to a reduction in annual Deferred Maintenance projects. 75% Project Accounting <ul style="list-style-type: none"> FS has contracted with Maximus to implement a system conversion to FacilityMax, an improved maintenance management system that will hopefully allow FS to consolidate several of its operations into this new system, making us more efficient. FS plans to go live on October 1, 2008.

FINANCIAL SERVICES FAMILY

Accounting

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Customers Processes	Build a Welcoming Campus	Facilitate access to campus services.	Provide volunteer mentors for College of Business Administration students to facilitate better student retention.	5/08	Number of volunteers involved.	100% Goal changed to assisting students directly in whatever way possible. AS employees have volunteered for campus (e.g. providing assistance to SFSC during peak times, commencement volunteers), helped to implement eRefund and assisted visitors by wearing our name badges around campus to be a ready resource

Processes	Develop Community Support	Maintain the highest standards in financial and operational systems management. Facilitate access to campus services. Build trust between ABA and our constituents.	Provide useful Accounting information for the campus. <i>Action:</i> Work with Business Information Services to improve/maintain an informative website, Create Business Matters at Sac State (BMSS) quick reference guides and participate in Business Partners Round Tables.	4/08	Survey Campus Satisfaction with Departmental Website and Information provided by Accounting Services	100%
Processes	Develop Community Support	Facilitate access to campus services.	Streamline and thoroughly document Revenue Management Program (RMP) processes; Processes that are more efficient, effective and will assist in cross-training staff.	4/08	Complete AS Manual of RMP processes that is easy for back-up staff to follow.	80%

Accounts Payable

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Processes	Develop Community Support	Maintain the highest standards in financial and operational systems management. Facilitate access to campus services. Build trust between ABA and our constituents.	Implement new system-wide Travel Model Practice as it applies to Sac State.	5/08	Meet system-wide deadline dates for surveys, participate in system-wide review meetings and implement per guidelines	100% - Participated in Systemwide Travel Best Practices Initiative development as it applies to Sac State – during this quarter participated in Vision Validation Workshop and Requirements Session. Volunteered to be Close Follower to implement T&E Module.
Processes	Develop Community Support	Maintain the highest standards in financial and operational systems management. Facilitate access to campus services. Build trust between ABA and our constituents.	Provide useful Accounts Payable information for the campus. <i>Action:</i> Work with Business Information Services to improve/maintain an informative website, Create Business Matters at Sac State (BMSS) quick reference guides and participate in Business Partners Round Tables.	4/08	Survey Campus Satisfaction with Departmental Website and Information provided by Accounts Payable	100%
Processes	Develop Community Support	Maintain the highest standards in financial and operational systems management. Facilitate access to campus services. Build trust between ABA and our constituents.	Improve CCE processing of Direct Payments Requests and Travel by developing processes that are more efficient and effective for CCE and Accounts Payable.	4/08	CCE and A/P satisfaction with transition and improved processing time	50%

Budget Planning & Administration

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Processes	Develop community support	Build trust between ABA and our constituents.	Provide useful financial data and expertise which allows the University Budget Advisory Committee to make	6/08	University Budget Advisory Committee satisfaction with data and support provided by	100% - Prepared revenue and expenditure projections, carry forward balances, and budget call documents to aid in UBAC deliberations in the budget process.

			informed decisions and processes.		Budget Planning & Admin. Office.	
Processes	Develop community support	Build trust between ABA and our constituents.	Provide transparency of financial data to the University and beyond thereby creating an informed campus.	0/08	Publication of annual budget report.	100% Completed the Annual report of Budget, expenditures and Financial Information and sent to Reprographics for duplication
Stewardship & Image	Create a dynamic physical environment	Promote ABA's contributions toward achieving University goals.	Complete non-state capital project financing for Recreation Wellness Center.	6/08	Board of Trustees approval of Recreation Wellness Center.	75% - pro forma is basically complete, waiting for GMAX price in August 2008 and BOT Meeting in September 2008.
Processes	Build a welcoming campus	Promote responsible stewardship	Determine which budgeting software system will meet the office's budget planning needs and provide efficiencies in data gathering processes	6/08	Select budget software for implementation.	100% Reviewed and chose a Budget Planning Module software for implementation.

Procurement & Contract Services

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Processes	Build a welcoming campus	Maintain the highest standards in financial and operational systems management. Facilitate access to campus services.	Accessibility Technology Initiative (ATI) procurement plan and implementation for purchases of \$50,000.00 and above Set up training modules for use by the IT Technicians on the campus establishing policy and procedures for the purchase of IT equipment and software.	06/08	When the plan has been developed, communicate to the campus	80% There has been no further progress on this goal.

SFSC

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Customers & Process	Build a Welcoming Campus	Facilitate access to campus services.	Implement a Financial Aid Direct Deposit program: <ul style="list-style-type: none"> Select and purchase a software system and service provided for the direct deposit program. Successfully implement the software, including the training of staff to support the program. Successfully communicate and enroll students on the program prior to the first spring 2008 term disbursement. 	6/08	<ul style="list-style-type: none"> Execute a contract for service in the required time frame. Make program available to students in the desired time frame. 40% enrollment in the first full term of implementation (spring '08). 	100%

Process	Build a Welcoming Campus	Facilitate access to campus services.	Complete implementation of the CMS Student Financials Module: <ul style="list-style-type: none"> • Successfully implement all processes of the CMS Student Financials module on time. • Successfully implement the Collections workflow module of Student Financials. • Successfully reduce, and convert legacy obligations to the Student Financials module in Fall '07 	6/08	<ul style="list-style-type: none"> • Meet required timeframes with expected process results. • Meet required timeframes with no loss of services to borrowers/debtors. • Meet required timeframes for conversion with the least amount of obligations, with not break in service 	85%
Customers	Build a Welcoming Campus	Facilitate access to campus services.	Complete implementation of the T-2 Power Park Flex Software in support of UTAPS. <ul style="list-style-type: none"> • Successfully implement all processes required to sell, inventory and reconcile parking permits and collect citations in the new software. • Successfully train all users of the software on proper cash handling related to the sale and collection of parking permits and citations. • Support UTAPS in the addition of faculty/staff permits being sold through the online service of T-2 Power Park Flex. 	6/08	<ul style="list-style-type: none"> • Meet required timeframes with expected process results. • Meet required timeframes with no loss of service to borrowers/debtors. • Meet required timeframes for sale of other types of permits as identified by UTAPS. 	100%

PUBLIC SAFETY FAMILY

Perspect	Destinatio	Outcome	Goal	Date	Measures	Progress
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service.	Implement a customer satisfaction training program for all employees. <i>Action:</i> <ul style="list-style-type: none"> • Provide additional training for all employees in customer service/satisfaction and problem-solving. 	May 2008	Track training and development courses and information provided. Distribute customer satisfaction survey cards and questionnaires and review comments for improvements.	25% Provide additional training for all employees in customer service/sa solving
Process	Build a	Create a safe campus	Ensure a safe environment conducive to	Marc	Map Internal Recruitment	65% Develop and implement plan to streamline and accelerate

	Welcoming Campus	environment	living, learning and academic freedom. <i>Action:</i> <ul style="list-style-type: none"> Develop and implement plan to streamline and accelerate recruitment process. (reduce vacancies, increase responsiveness) Develop and train appropriate campus personnel on disaster preparedness and new mandated requirements. 	h 2008	Process – collect data on time and steps Track Vacancies and time to fill Track number of programs/participants that received training.	recruitment process. 96% Develop and train appropriate campus personnel on disaster preparedness and new mandated requirements
People	Build A Welcoming Campus	Build a team of great leaders	Provide “cutting-edge” training in leadership and POST mandated perishable skills updates. <i>Action:</i> <ul style="list-style-type: none"> Develop training plan for leadership skills Develop Internally consistent Business and Operational Processes. <ul style="list-style-type: none"> Develop Process Mapping skill sets to improve continuity and consistency 	June 2008	Collect data on number of leadership development courses/programs completed. Track number of Business Processes Mapped and Implemented	85% Develop training plan for leadership skills 25% Develop Process Mapping skill sets to improve continuity and consistency 70% Develop Internally consistent Business and Operational processes
Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management	Provide mechanism for monitoring and enhancing efficiency and effectiveness in responding to community requests for service. <i>Action:</i> <ul style="list-style-type: none"> Implement updated ARMS Computer Aided Dispatch system and train personnel on new system Update ARMS with new locations and track calls for service with increased granularity 	June 2008	Number of new query/reports created with increased levels of detail and granularity	100% Implement updated ARMS CAD system and train personnel on new system 80% Update ARMS with new locations and track calls for service with increased granularity 65% Provide mechanism for monitoring and enhancing efficiency and effectiveness in responding to community requests for service.

RISK MANAGEMENT SERVICES FAMILY

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Processes	Build a welcoming Campus	Make the campus easy to navigate, technologically and physically.	LMS Enhancement: Improve the accuracy of LMS Learning Tracks (LT). Action: Work with MaxIT, Inc. to develop an automated self assessment tool that will auto assign LT requirements based on employee responses.	6/08	Implementation and beta testing by January 08. Count the number of LT surveys, as a function of the number of employees, which	The new Enterprise version of LW has been installed on the EHS2 server. It includes the survey/assessment tool. RMS is currently in the testing phase of the software.

					have been completed.	
Process	Build a welcoming Campus	Make the campus easy to navigate, technologically and physically.	Astra Schedule Software: Develop and implement events scheduling, related events services, event billing, and event reporting.	6/08	Events scheduling configured, tested, and implemented beginning with fall 2007 term based on completion of project plan tasks.	100% New Astra events scheduling system was developed and implemented, all relevant staff were trained and external training documented, edit and calendar reports were developed. Basic internal event scheduling documentation was drafted. End of year billing reports are in the process of development.
Process	Build a Welcoming Campus	Make the campus easy to navigate, technologically and physically.	Astra Schedule/CMS Software: Develop and implement a final exam schedule and process for fall and spring terms starting with fall 2007.	6/08	Final exam schedule and process developed, tested, and implemented beginning with fall 2007 term.	Astra Schedule/CMS Software: New CMS/Astra final exam process was developed and implemented, relevant staff trained, and final exam reports developed. Final exam process documentation has been drafted.
Processes	Build a welcoming Campus	Make the campus easy to navigate, technologically and physically.	Develop and Implement BCP database for capturing departmental BCP procedures and measuring the level of campus compliance.	6/08	Count the number of training presentations completed. Identify and assign department to complete BCPs. Compare the number of assigned departments to the number of BCP submitted and approved by RMS.	Although training continues to be regularly scheduled by RMS, employee participation has dropped off significantly in the last year. In 08, 447 employees completed compliance training vs. 1442 in 07 for the same time period. 51 departments have been established w/in the BCP system. Of the 51 departments, 27 have taken action on developing their plans and 7 have been completed.

VICE PRESIDENT FOR ADMINISTRATION FAMILY

Administrative Operations

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
People	Build a Welcoming Campus	Improve employee morale	Enhance knowledge and skills through professional development.	June 2008	Number of professional development training sessions attended.	Number of professional development training sessions attended: 50% <ul style="list-style-type: none"> Completed CSU Conflict of Interest On-line Training, May 6, 2008/Kem. Excel 2007 – Formatting, June 30, 2008/Serena.
Process	Build a Welcoming Campus	Foster an informed campus, respectful of compliance	Develop a comprehensive Records Management Program.	June 2008	Number of Records Management Advisory Committee meetings attended; Number of campus-wide	<ul style="list-style-type: none"> %75 Number of Records Management Advisory Committee meetings held: NONE

					training sessions held; Develop & launch Records Management web site; maintain currency of content.	Develop and launch Records Management web site: <ul style="list-style-type: none"> Met with Dave Margolis on Records Management web site, May 1, 2008. Met with new IRT web person to discuss web site template Completed revised template June 2008; Worked on web site material; 80% complete
Stewardship & Image	Develop Community Support	Develop a meaningful presence and influence within metropolitan Sacramento	Participate in community organization events/activities. Participate in Association of Records Management Administrators (ARMA) via Sacramento Chapter meetings and ARMA seminars and conferences.	June 2008	Number of events/activities attended and number of monthly meetings/conferences/seminars attended.	90% Number of events/activities attended and number of monthly meetings/conference/seminars attended: community organization events/activities, ARMA International and local meetings, and Chancellor's Office meetings: <ul style="list-style-type: none"> CSU Facilities Management Conference Steering Committee Meetings, June 25, 2008, May 28, 2008, April 30, 2008. Coordinated and attended Mayor Joseph Serna Jr. Annual Scholarship dinner, May 30, 2008 at University Union, Ballroom – hosted by Sacramento Hispanic Chamber of Commerce & VP for Administration Office. Attended Leadership in Action Alums Luncheon, May 30, 2008 - hosted by HR. Coordinated and attended system-wide CABO Meeting, April 8-9, 2008. CSU Facilities Management Conference Keynote Speaker Subcommittee, May 19, 2008, April 7, 2008.

Auditing Services

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures	Progress
Process	Build a Welcoming Campus	Promote Responsible Stewardship	Maintain Auditing Services' web page to ensure content is current, accurate, understandable, useful, informative; and meets ABA Standards	June 2008	Updates/revisions to web site	25% Web site content: current, accurate, understandable, informative: PENDING
Stewardship & Image	Build a Welcoming Campus	Maintain highest standards in financial & operational systems management	Meetings with Vice Presidents and Deans at least annually, to discuss audit's role and their needs	June 2008	Number of meetings held	10% Meetings: <ul style="list-style-type: none"> ISO Jeff Williams Presentation to CCE Managers and Supervisors <ul style="list-style-type: none"> Internal Controls and Ethics

August 2008