

SACRAMENTO STATE
ADMINISTRATION & BUSINESS AFFAIRS FAMILIES
2006/07 GOALS & MEASURES
DESTINATION 2010

ADMINISTRATIVE SERVICES FAMILY

Business Information Services (BIS)

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service.	<ul style="list-style-type: none"> • Enhance speed of nVision reports. • Work with our Customers to create and enhance the usability of system tools for providing accurate and timely reporting data 	6/07	<ul style="list-style-type: none"> • The extent to which nVison drills are sped up. • The number of key reporting enhancements which are identified and delivered.
Processes	Build a Welcoming Campus	Make the campus easy to navigate technologically and physically.	Support and train departmental users on web site maintenance, web template standards and accessibility requirements for ABA and HR web infrastructure.	6/07	The number of ABA departments transitioned to the new template procedures and updating their own web pages – comparison from 2005/06 to 2006/07.
People	Build a Welcoming Campus	Build a team of great leaders.	Maintain an annual professional development plan for each employee that focuses on enhancing skill set and improving proficiency of office operations.	6/07	The number of plans developed compared to the number of employees.
Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management.	Provide first class software development and production support for enhancing business information processes. <ul style="list-style-type: none"> a) Support CMS implementations (ex: Student Financial, Financial Data Warehouse, Base Benefits). b) Migrate existing systems off the IBM mainframe. c) Support the implementation of UTAP’s web-based citations payments, citations appeals, and parking permit sales. d) Upgrade existing Advance software to newest software update. 	6/07	Completion of projects and number of milestones reached.

Common Management Systems (CMS)

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Expand the self service offered on “My Sac State” throughout the completion of the Student Administration implementation.	6/07	Number of self service features offered through portal – compare 6/30/06 to 6/30/07.

Processes	Build a Welcoming Campus	Make the campus easy to navigate technologically and physically.	Review the CMS Request for User Account process and develop a plan to redefine the procedure in preparation for SA implementation.	6/07	Completion of review and development of improved procedure.
People	Build a Welcoming Campus	Develop high employee morale.	Improve customer service at the CMS Help Desk by expanding the training model established with the HR 8.9 upgrade. This will include the implementation of a cross-training plan for staff.	6/07	<ul style="list-style-type: none"> • Number of staff trained • Develop a survey to assess the level of service provided.
Stewardship & Image	Develop Community Support	Maintain the highest standards of financial and operational systems management.	<ul style="list-style-type: none"> • Expand participation on system-wide committees and attendance at appropriate conferences to promote the image of the University. • Implement three modules in HR: eRecruit, Absence Mgmt., and Benefits Administration • Reach the following milestones in SA implementation: Catalog, Schedule of Classes, Recruitment, Admissions, Financial Aid, Registration, and Transfer Credit 	6/07	<ul style="list-style-type: none"> • Comparison of systemwide committee participation and conference attendance – 2005/06 vs. 2006/07. • Number of HR modules implemented • Number of milestones reached*
Strategic Planning & Quality Improvement					
Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Emphasize delivery of customer service in each ABA department and unit: <ul style="list-style-type: none"> • Each department define first-rate customer service and establish standards • START facilitate department processes as needed 	6/07	% of total ABA departments with customer service standards for their area established and posted on website
Processes	Develop Community Support	Foster an informed campus respectful of compliance	ABA managers complete required / mandated training: <ul style="list-style-type: none"> • Family heads identify training requirements for each manager • Track training requirements and progress using Learner Web • Family heads review quarterly Learner Web reports and follow-up to assure progress 	6/07	% of total required / mandated training courses complete (measure at beginning and end of fiscal year)
People	Build a Welcoming Campus	Develop High Employee Morale	Increase participation in division recognition programs: <ul style="list-style-type: none"> • Extend lead time for nominations • Publicize program/deadlines early/widely • Promote program through managers • Provide paper/electronic nominations forms • Solicit recommendations for improvement from 05/06 peer award selection team • Resurvey staff to evaluate enhancements • Increase opportunities for show of appreciation (newsletter, thank-you cards) • START recommend further improvements 	6/07	# of nominations submitted for winter and spring programs compared to 2005/06

Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management	All University policies administered through ABA are current: <ul style="list-style-type: none"> Review all division policies and <i>delegations of authority</i> Identify outdated policy and delegations Update outdated policy and process for posting to the University manual 	6/07	% of total policies/delegations reviewed and/or updated and posted
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BUSINESS OPERATIONS FAMILY

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Enhance information delivery at the campus information booths by adding internet capability.	6/7	The internet connected and functioning properly. *
Processes	Build a Welcoming Campus	Make the campus easy to navigate, technologically and physically	Enhance on-line services to campus community by implementing on-line; citation payment, OneCard deposits, and reprographic work orders.	6/7	The % of people that shift from the current off-line method to use of the on-line method.
People	Build a Welcoming Campus	Build a team of great leaders	Identify critical function areas in Business Operations and cross train staff to ensure operation continuity	6/7	Number of functions identified and staff cross trained.
Stewardship & Image		Foster an informed campus, respectful of compliance	Enhance communication of Business Operations services by: rewriting the Business Operations section of the University Manual; presenting at both employee, and student orientations	6/7	Completion of section rewrite; and positive survey results regarding knowledge of Business Operations services by the campus community.

FACILITIES SERVICES FAMILY

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	<ul style="list-style-type: none"> Conduct the training (possibly with help from an outside instructor) Develop an electronic small-scale customer satisfaction survey to send to customers when they call in with facility and grounds problems 	6/07	<ul style="list-style-type: none"> Number of people trained Develop baseline and set target for improvement
Customers	Build a Welcoming Campus	Build facilities and landscapes with a distinct architectural image	<ul style="list-style-type: none"> Develop architectural standards document 	6/07	Completion of document with information suitable to give to all future designers hired by the University
Processes	Build a Welcoming Campus	Make the campus easy to navigate technologically and physically	<ul style="list-style-type: none"> Fabricate and Install fist phase of the “Way-Finder” sign system. Define phase two of sign system, fabricate and install second phase based on funding available 	6/07	Percentage of project completed Percentage of project completed
People	Build a Welcoming	Develop high employee morale	<ul style="list-style-type: none"> Continue activities that improve morale, such as, employee recognition, employee 	6/06	Focus group recommendations

	Campus		BBQ, ice cream social and Holiday luncheon <ul style="list-style-type: none"> Conduct focus group assessment 		
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FINANCIAL SERVICES FAMILY

Accounting Services

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management	Meet Established Financial Deadlines (Departmental, Financial Services, ABA, Sac State, Chancellor's Office and State of California). (e.g. reconciliations within 30 days – <i>FISMA</i> finding, Legal and GAAP YE Close by announced deadlines, etc.) <i>Action:</i> Insure resources (staff, training, tools) are available to fulfill this goal.	4/07	% of deadlines met
Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management	Shift Financial Operations to Trust (from Appropriations) – AKA Fee Revenue Management Program	6/07	FRMP Transition 100% Complete Zero balance in General Funds at YE Campus fully informed
Processes	Develop Community Support	Foster an informed campus, respectful of compliance	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 Partner Round Tables.	4/07	Survey Campus Satisfaction with Departmental Website and Information provided by Accounting Services
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Serve customers effectively when primary staff is unavailable <i>Action:</i> Cross-train unit employees in all job duties	4/07	% of job duties backed up (Plan to increase this percentage annually)
People	Build A Welcoming Campus	Build a team of great leaders	Enhance the knowledge of the Accounting Services Office professionals through individual training plans, <i>Action:</i> Create/maintain/support professional training plans for each staff member	4/07	Professional training plans listed on each employee evaluation (In following year, measure % completion for each employee)

Accounts Payable

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management	Meet Established Financial Deadlines (Departmental, Financial Services, ABA, Sac State, Chancellor's Office and State of California). (e.g. reconciliations within 30 days – <i>FISMA</i> finding, Travel advance follow-up within 30 days of travel, Travel payments within two weeks, Vendor payments within 30 days, Legal and GAAP YE Close by announced deadlines, etc.) <i>Action:</i> Insure resources (staff, training, tools) are available to fulfill this goal.	4/07	% of deadlines met
Stewardship & Image	Develop Community Support	Maintain the highest standards in financial and operational systems management	Shift Financial Operations to Trust (from Appropriations) – AKA Fee Revenue Management Program	6/07	FRMP Transition 100% Complete Zero balance in General Funds at YE

					Campus fully informed FRMP Transition 100% Complete
Process	Develop Community Support	Foster an informed campus respectful of compliance	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 Partner Round Tables.	4/07	Survey Campus Satisfaction with Departmental Website and Information provided by Accounts Payable
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Serve customers effectively with knowledgeable staff, regardless of primary office functions <i>Actions:</i> <ul style="list-style-type: none"> • Cross-train each employee to build knowledge base outside of primary duties • Effectively communicate with customers to assure satisfaction and provision of key information 	4/07	% of duties backed-up by two staff members (Increase percentage to 100 percent)
People	Build a welcoming Campus	Build a team of great leaders	Enhance the knowledge of the Account Payable Office professionals through individual training plans. <i>Action:</i> Create, maintain and support personal training plans for each	04/07	Include professional training plans in each employee evaluation (Measure % of completion of each training plan next evaluation).

Student Financial Services

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Support increased employee training to better serve the campus community. <ul style="list-style-type: none"> • Develop a plan to test and train on the campus map/departments in buildings. • Successfully train staff on the CMS Student Financials module. • Develop a training “check-up” for CMS Student Financials. 	6/07	<ul style="list-style-type: none"> • Increase the number of correct departments/buildings identified. • Meet required timeframes for training. • Reduce the number of “re-trains”.
Process	Foster Community Support	Foster an informed campus, respectful of compliance	Support the move of fees to trust: <ul style="list-style-type: none"> • Work with all Financial Services to implement necessary processes. 	6/07	<ul style="list-style-type: none"> • Meet required timeframes for implementation.
Customers	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Augment technology to provide improved customer service to the campus community. <ul style="list-style-type: none"> • Successfully implement CMS Student Financials module on time. • Successfully implement the new billing service for collections, ECSI. • Install computer in SFSC cashiers lobby. • Improve communication of the “new” installment plan to increase awareness of deadlines. 	6/07	<ul style="list-style-type: none"> • Meet required timeframes for implementation. • Meet required timeframes for implementation with no loss of service to borrowers/debtors. • Count number of students served by being able to access Cashnet SmartPay on location and assess satisfaction. Reduce the number of late fees.
Customers	Build a	Become ambassadors of the	Evaluate and enhance the Money Management	6/07	<ul style="list-style-type: none"> • Increased satisfaction on surveys.

	Welcoming Campus	campus, providing first-rate customer service	program “Your Money Matters!”: <ul style="list-style-type: none"> Institute an evaluation sheet for presentations. Develop a plan to enhance or expand the program based on survey suggestions 		Initiate at least two enhancements/expansions this year.
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University Budget Office

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customers	Develop Community Support	Foster an informed campus, respectful of compliance	Converting campus operations under “Fees to Trust” if approved.	6/07	Have the campus fully converted into Trust by the end of the 2006-07 fiscal year by charting completion of processes along the way
Process	Develop Community Support	Foster an informed campus, respectful of compliance	Meeting the State and CSU financial year end close deadline of July 15, 2006	6/07	Identify when final reports are sent to the State and Chancellor’s Office to determine if target has been met
People	Create a Dynamic Physical Environment	Develop a meaningful presence and influence within metropolitan Sacramento	Obtaining debt issuance approval from the CSU Board of Trustees on the Capital Projects (e.g. Fieldhouse, Recreation and Wellness Center, and Student Housing)	6/07	Document when each Capital Project is presented to the Board of Trustees and indicate whether project is passed or not
Stewardship & Image	Build a Welcoming Campus	Become ambassadors of the campus, providing first-rate customer service	Designing a Lottery procedure (in conjunction with Academic Affairs and Accounting Services) which will ensure timely allocation of funds: <ul style="list-style-type: none"> Post budget for revenue transfers in the month it has been received; Post rollover fund balances by September’s month-end. 	6/07	List when budget have been posted for the rollover balances and document when revenues were received and when it was posted
People	Build A Welcoming Campus	Build a team of great leaders	Continue cross training of new staff: <ul style="list-style-type: none"> Have them double check project data of existing staff’s work for quality control and helps new staff to learn the process Existing staff learn any new processes that are given to the new staff 	6/07	Maintain a list of the projects completed, when it was reviewed, and number of times revisions were made
Process	Develop Community Support	Maintain the highest standards in financial and operational systems management	Investigate the possibility of purchasing a third party budgeting system to interface with CMS <ul style="list-style-type: none"> System will generate data using various scenarios in regards to budget, revenues and expenditures. 	6/07	Provide the necessary information to Financial Services so that a decision can be made on whether a budgeting software system should be purchased to meet the family’s needs by the end of the fiscal year.

PUBLIC SAFETY FAMILY

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
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> Provide additional training for all employees in customer service/satisfaction and problem-solving. Increase number of foot patrols and police	June 2007	Track training and development courses and information provided. Distribute customer satisfaction survey cards and questionnaires and review comments for improvements. Collect and analyze data on the number of log

			bicycle patrols on the interior of campus and buildings		entries/time spent on specific patrols.
Process	Build a Welcoming Campus	Create a safe campus environment	Ensure a safe environment conducive to living, learning and academic freedom. <i>Action:</i> <ul style="list-style-type: none"> Develop/update Dispatch Communications Center to meet current standards and community needs. Develop and train appropriate campus personnel on disaster preparedness and new mandated requirements. 	March 2007	Monitor progress and specify timelines with consultant and appropriate campus departments and private vendors. Track number of programs/participants that received training.
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 Schedule all personnel for perishable skills training (tactical communication, defensive driving, etc.) 	June 2007	Collect data on number of leadership development courses/programs completed. Track number of personnel assigned/completed perishable skills training courses.
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"> Analyze and improve current procedures for timeliness (efficiency) in responding to calls for service based on staffing levels 	June 2007	Compare response times from 2004/05 and 2005/06 to 2006-07 for selected calls for service.

RISK MANAGEMENT SERVICES FAMILY

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customer	Build a welcoming Campus	Foster an informed campus respectful of compliance.	To improve communication and consistency, revise SM Policies and Procedures. <i>Action:</i> Revise and implement Policy on Use of University Facilities.	4/07	Submitted to campus administration, through VP for ABA, for review and approval.
People	Build a welcoming Campus	Build a team of great leaders	Enhance the knowledge of the RMS professionals through individual training plans. <i>Action:</i> Create/maintain/support professional training plans for each staff member relevant to their responsibilities.	9/06	Professional training plans listed on each employee evaluation (In following year, measure % completion for each employee).
Process	Build a welcoming Campus	Make the campus easy to navigate, technologically and physically.	LMS enhancement: Create a Professional Learning Track module in LearnerWeb. Update IIPP and EAP.	12/06 6/06	WBT development of an Emergency Action Program for campus wide use. Install on LearnerWeb. New script for WBT of IIPP.
Process	Build a welcoming Campus	Make the campus easy to navigate, technologically and physically.	Develop and establish CMS/PS facilities scheduling requirements and new Astra Schedule scheduling software for campus-wide use for academic class scheduling and final	10/M 07	Develop and establish PS and Astra academic process and report requirements. Develop and establish facilities foundation tables, security setup and user access for Astra Schedule.

			exam scheduling. Action: Install and test interface.		Initiate events scheduling plans to use Astra Schedule for production effective in Fall 2007.
Stewardship & Image	Build A welcoming Campus	Foster an informed campus respectful of compliance.	Develop a “master” Business Continuity Plan (BCP). Action: Complete draft of master template and submit to CSEH Committee for comment. Post master plan on RMS web page. Schedule department training on plan.	6/07	Draft BCP submitted to CSEHC

VICE PRESIDENT FOR ADMINISTRATION FAMILY

Management Services

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
Customer	Build a welcoming campus	Become ambassadors of the campus, providing first-rate customer service	Revisit, develop & recommend updates to the current University Records Retention Policy	July 2007	Number of meetings held
Process	Develop Community Support	Foster an informed campus, respectful of compliance / Make the campus easy to navigate, technologically and physically	Develop campus-wide workshops on Records Management & University Archives to update management & administrative support staff on legal requirements and ramifications of non compliance in conjunction with University Counsel and University Archivist. Update policy on University Records Management program Update Records Retention Schedule	Dec 2007	Number of workshops held
Process	Build a welcoming campus	Build a team of great leaders	Attend ARMA Annual Conference to maintain currency in field. Track mandated training for ABA Administrative Council Members.	July 2007	Number of training sessions/conferences/meetings attended
Stewardship & Image	Develop Community Support	Develop a meaningful presence and influence within metropolitan Sacramento	Participate in the Sacramento Chapter of ARMA – attend at least 2 monthly meetings and 1 seminar Develop introduction page for Records Management Web Site. Have web site activated for campus-wide access.	July 2007	Number of monthly meetings and seminars attended Website progress

Auditing Services

Perspective	Destination 2010 Link	Outcome	Goal	Date	Measures
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Customer	Build a welcoming campus	Become ambassadors of the campus, providing first-rate customer service	Meet with Vice Presidents and Deans at least annually to discuss audit's role and their needs	July 2007	Number of meetings held
Process	Develop Community Support	Foster an informed campus, respectful of compliance / Make the campus easy to navigate, technologically and physically	Update Auditing Services' web page to ensure content is current, accurate, understandable, useful, informative; and meets ABA Standards	July 2007	Updates/revisions to web site
People	Build a welcoming campus	Build a team of great leaders	Attend professional development courses to maintain currency in field: Staff: at least one tax and one audit program Director: maintain professional designation (40 hours per year)	July 2007	Number of training sessions attended
Stewardship & Image	Develop Community Support	Develop a meaningful presence and influence within metropolitan Sacramento	Participation in Sacramento chapter of Institute of Internal Auditors – attend at least two monthly meetings, and one seminar	July 2007	Number of monthly meetings and seminars attended
					June 2007