

Cal Poly Humboldt Strategic Plan 2021-2026
Financial Services Integrated Assessment and Planning
MBU Purpose, Key Activities & Objectives

PURPOSE STATEMENT

Financial Services is dedicated to maintaining and advancing Cal Poly Humboldt financial operations and sustainable resource practices. We achieve this through sound resource planning and stewardship, strategic partnership and collaboration, and financial services that are connected and supportive campus-wide and to the regional community.

FINANCIAL SERVICES KEY ACTIVITIES

1. Expand access to professional development through internal and external training for Financial Services employees
2. Develop and provide campus-wide Financial Services training programs
- 3a. Implement self-service time entry for non salary appointments
- 3b. Implement Student Financial Services student access
- 3c. Implement travel advancements/personal payback
- 4a. Develop campus-wide multi-year planning framework
- 4b. Value creation through leveraging deals and strategic sponsorships

FINANCIAL SERVICES OBJECTIVES

1. Provide equitable opportunities to professional development through internal and external training for Financial Services employees
2. Provide campus-wide educational opportunities on Financial Services processes through content creation and training programs to promote a more well informed campus community
3. Increase operational efficiencies and reduce administrative barriers to improve employee and student experiences through technological enhancements to offered services
4. Provide multi-year planning tools to help guide campus-wide planning efforts as we transition to a Polytechnic and continue to look for value creation opportunities to strengthen our strategic investment and sustainable resource planning efforts to advance inclusive excellence

FINANCIAL SERVICES MAPPING TO DIVISION STRATEGIC PLAN & PILLARS OF INCLUSIVE EXCELLENCE

MBU Objectives	MBU Key Activities	Division Outcomes	Division Priorities	Pillars of Inclusive Excellence
1. Provide equitable opportunities to professional development through internal and external training for Financial Services employees	1. Expand access to professional development through internal and external training for Financial Services employees	1. Increased employee retention by expanding training and development opportunities	1. Demonstrate support to employee success and provide opportunity for professional development	Pillar 2. Equitable Opportunities and Outcomes
2. Provide campus-wide educational opportunities on Financial Services processes through content creation and training programs to promote a more well informed campus community	2. Develop and provide campus-wide Financial Services training programs	3. Enhance campus collaboration by improving existing and establishing new formal training and communication venues campus wide	3. Promote adaptable and attentive collaboration that supports campus communication, engagement, growth, and resilience	
3. Increase operational efficiencies and reduce administrative barriers to improve employee and student experiences through technological enhancements to offered services	3a. Implement self-service time entry for non salary appointments 3b. Implement Student Financial Services student access 3c. Implement travel advancements/personal payback	4. Increased efficiency in divisional service delivery, reduced redundancy, and clearer communication to service recipients 6. Improved student experience through enhanced participation and employment opportunities	4. Deliver quality services, efficient operations, and meaningful, positive interactions 6. Prioritize student training, engagement, and service delivery within the division of Administrative Affairs	Pillar 2. Equitable Opportunities and Outcomes
4. Provide multi-year planning tools to help guide campus-wide planning efforts as we transition to a Polytechnic and continue to look for value creation opportunities to strengthen our strategic investment and sustainable resource planning efforts to advance inclusive excellence	4a. Develop campus-wide multi-year planning framework 4b. Value creation through leveraging deals and strategic sponsorships	5. Lead the development of strategic investment and sustainable resources planning in alignment with the University Strategic Plan, divisional goals and outcomes, and the Polytechnic Prospectus	5. Lead the strategic investment and management of all resources, in alignment with university planning and in the context of resource sustainability	Pillar 5. Organizational Resources

FINANCIAL SERVICES DATA COLLECTION TABLE

MBU Objectives	Department	Department Key Activities	Measures	Data Source	Timeline for Data Collection	Person Responsible for Data Collection
1. Provide equitable opportunities to professional development through internal and external training for Financial Services employees	MBU Wide	Expand access to professional development through internal and external training for Financial Services employees	- % of employees with professional development plans (goal: 100%) - 10% increase in spending on professional development / travel - 10% increase in internal and external training participation - Assess training participants' satisfaction through surveys. First year to serve as a baseline	- Professional development plan repository (new) - Quarterly financial review submissions - Concur, campus training tracking (need to explore this) - Distribute and collect standardized survey's from participants at the end of each training provided	Review yearly in October for prior FY	Amber Blakeslee
2. Provide campus-wide educational opportunities on Financial Services processes through content creation and training programs to promote a more well informed campus community	Budget Office	Build a library of content/training materials (videos & BPG) on UBO website and hold periodic live training (Zoom and/or in person)	- Area is not overspent at year-end - 10% increase in training website traffic year over year - 10% increase in open training sessions held	- Quarterly financial review submissions - Training website traffic - Number of training sessions held	Review yearly in October after budget is posted	Amber Blakeslee
2. Provide campus-wide educational opportunities on Financial Services processes through content creation and training programs to promote a more well informed campus community	Accounts Payable	Build a library of content/training materials (videos & BPG) on A/P website and hold periodic live training (Zoom and/or in person)	- 10% increase in training attendance YOY (Sign-in sheets, CSU Buy) - Decrease in the number of one-on-one training sessions. First year to serve as a baseline	- Tracking participation (ASC, Budget Analyst, etc.) for trainings held (CSU Buy, Sign-In Sheets) - Content Creation	Review yearly after the end of the Fiscal Year	Tawny Fleming

2. Provide campus-wide educational opportunities on Financial Services processes through content creation and training programs to promote a more well informed campus community	Accounting	Build a library of content/training materials (videos & BPG) on Accounting website and hold periodic live training (Zoom and/or in person)	- Decrease number of self-made errors by 20% - Decrease number of change request by 10% - Hold 2 trainings a year (one each semester)	- Number of error/corrections (e.g track the number Z dollar checks) - Number of training sessions held - CSU Buy trx type/Change request	Review yearly after the end of the Fiscal Year	Amber Blakeslee
3. Implement new and enhance existing services to employees and students by integrating technologies and tools to increase efficiency and improve the user experience	Student Financial Services	Increased access to students and parents on detailed amounts due by implementing and upgraded version of CashNet	- 10% decrease in the number of calls from Students/Parents. First year to serve as a baseline	- Track number of calls during typical peak call volume months (August and January)	Once a semester after the busy months of August and January	Sandy Wieckowski
3. Implement new and enhance existing services to employees and students by integrating technologies and tools to increase efficiency and improve the user experience	Payroll	Roll out self-service time-entry for non salary appointments	- Decrease errors on the paytape: Compare data from prior pay tapes - Increased efficiency in routing of documents: Metrics on Last time sheets submitted due to the routing of virtual documents can be easily tracked and compared. - Increase in customer satisfaction: Pre and post survey.	- Paytape - Routing of documents - Surveys	Twice a year. A mid year review	Alexis Collins
3. Implement new and enhance existing services to employees and students by integrating technologies and tools to increase efficiency and improve the user experience	Accounts Payable & Student Financial Services	Transition to online payments for travel advancements which requires updates to item codes to directly post to concur. Implementation of a	- 10% increase in on-line payments being made	- Collect dataset(s) of how payments are made: in-person vs online - Survey of service delivery (need to explore this)	Once a semester	Sandy Wieckowski / Tawny Fleming

		new process and communication plan will be required.				
4. Develop multi-year planning tools to help guide campus-wide planning efforts as we transition to a Polytechnic and continue to look for value creation opportunities to strengthen our strategic investment and sustainable resource planning efforts	Budget Office	Develop multi year planning tools and provide guidance and training to the campus	- 100% collection of Multiyear templates - Increase in training participation and available materials. First year to serve as a baseline	- Multiyear templates - Training sessions/materials	Review yearly in October after budget is posted	Amber Blakeslee
4. Develop multi-year planning tools to help guide campus-wide planning efforts as we transition to a Polytechnic and continue to look for value creation opportunities to strengthen our strategic investment and sustainable resource planning efforts	Contracts and Procurement	Value Creation through leveraging deals and strategic sponsorships to achieve cost savings benefits and revenue generation.	\$940K Benefit (Revenue Generation and/or Cost Savings)	- Nationwide Benchmarking - Market Analysis - Leveraging Spend Analysis	Review yearly after the end of the Fiscal Year	Tawny Fleming