

**2010-2011 GOALS**  
**Finance & Facilities**  
**Budget Office**

1. Continue to meet all budget and reporting deadlines throughout the year. Provide budget and financial analysis to campus departments as needed.
2. Provide analysis for tuition and strategic planning discussions. Assist with development and implementation of separate tuition model for online instruction.
3. Continue to assist Enrollment Management and Athletics with planning and monitoring of institutional scholarship and waiver budgets. Establish preliminary award budgets for the 2011-12 fiscal no later than October 31.
4. Coordinate with Payroll Office to improve accuracy of salary encumbrances posted to Banner. Investigate the possibility of encumbering benefits in addition to salaries.

**2010-2011 GOALS**  
**Finance & Facilities**  
**Human Resources**

- 1) Employee Staff Development
  - a) Develop and or coordinate training opportunities for campus employees to help improve job effectiveness and proficiency.
  - b) Develop a training program and certification program for administrative assistants.
  - c) Research and propose an online performance evaluation system.
  
- 2) Recruitment
  - a) Research and implement a recruitment and on-boarding plan to welcome new employees to campus.
  
- 3) HRIS
  - a) Implement new changes to Banner HR as the result of changing to Banner 8.
  - b) Research and implement training and certification tracking in Banner.
  
- 4) Benefits
  - a) Implement new tracking reports for the University's self-funded insurance plan.
  - b) Assist in the expansion of the current University wellness effort.
  - c) Research a new and effective wellness program with financial incentives, activities, and contests.

**2010-2011 GOALS**  
**Finance & Facilities**  
**Facilities Management**

**Facilities Management Administration**

- 1) Administrative Team – investigate possibilities and funding for Facilities Management Leadership to attend APPA Leadership Training.

**Facilities Management Business Operations**

- 1) Perform a system wide audit of the Sprocket work order system to ensure accurate data entry of time and materials. Establish a procedure for periodic audits that happens on a regular basis. Also, assist with the set up and development of reports from the work order system to help Facilities Management Managers and Associate VP in making administrative decisions regarding staff and resources.
- 2) Increase knowledge of public administration by enrolling in and completing 12+ credits in the Master's of Public Administration program at SUU.
- 3) Establish a more efficient way of completing and tracking interdepartmental billing from our department to others on campus. This method will include a faster way to track what invoices have been processed based on date, work order #, amount, department, etc. It will also include a method for periodic billing of time or materials to appropriate accounts (ex. Student Center, President's Residence, Foundation Properties, etc.)
- 4) Participate in Professional Development opportunities (at least one meeting this year) offered through APPA, WACUBO, or NACUBO as budget and time permits.

**Utilities Services**

- 1) Work with Chevron Energy Solutions on the development of a performance contract that will integrate realistic energy conservation measures with a financial plan that will benefit the campus. Completion of an investment grade audit that will identify these energy projects on campus within 100 days from contracting.
- 2) Further improve tunnel safety by adding 8 additional emergency call boxes and reflective exit signage.
- 3) Work with DFCM to accomplish the replacement of boiler #1 in the Heat Plant, striving for a substantial completion date of February 2011.
- 4) Take one APPA professional development class to further facilities education.

**Grounds and Gardens**

- 1) Using our own wood chips and dye, make our own colored bark to save money.

**2010-2011 GOALS**  
**Finance & Facilities**  
**Facilities Management - Continued**

- 2) Update campus tree website to reflect species additions/removals. Identify website entries needing updated shots and photographs of trees to add to website.
- 3) Diversify campus plantings by adding 12 new perennial species. The majority of species should possess xeric adaptability.

**Building Maintenance, Repairs and Project Administration**

- 1) Further develop strong coordination and relationship with DFCM on Capital Improvement Projects with weekly meetings or phone calls.
- 2) Work with Staff on International Building Code (IBC) training and teach staff basic implementation.
- 3) Provide quarterly administrative reports using the work order system to assess capital improvement needs and crew productivity.
- 4) Install and implement electronic access control in the Student Center which will allow greater accessibility to student government while not compromising security of the facility.
- 5) Provide internship positions in the areas of Fire & Life Safety and Facilities Maintenance. Work with academics to have this provide course credit and work experience.
- 6) Attend APPA training course during FY 2011.
- 7) Begin the MPA course of study at SUU.

**Custodial Services**

- 1) Implement a faculty/staff satisfaction survey to assure the Custodial Services division is meeting the customers' needs. The survey will provide valuable information on how work performed is perceived by customers and then provide the ability to strive for improvement in targeted areas.
- 2) Manager, Custodial Services would like to achieve the APPA credential of CEFPP (Certified Educational Facilities Professional.) The first step is to pass the EFP (Educational Facilities Professional) examination.
- 3) Manager of Custodial Services meet with all student hires and provide training twice per year.
- 4) Develop useable Facilities Management administrative reports from the work order system.
- 5) Perform in-house Facility Condition Assessment to be used as administrative tool.

**2010-2011 GOALS**  
**Finance & Facilities**  
**Facilities Management - Continued**

**Space Planning, Risk and Project Administration**

- 1) Further develop scheduling and estimating skills through classes or personal study.
- 2) Identify and enroll in current IBC class taught in Utah.
- 3) Update comprehensive contractor and subcontractor list.
- 4) Take APPA supervisory training course during FY 2011.
- 5) Extend responsibility & increase expectation with students through written job descriptions.
- 6) Take LEED Green associate exam and begin requirements for LEED to become accredited professional.

**Motor Pool & Receiving**

- 1) Implement an improved process for electronically receiving Purchase Orders in Banner, by working with the Purchasing Department and Accounts Payable.
- 2) Replace last remaining gas-fueled sedan with a hybrid so all sedans in the rental fleet are hybrids.
- 3) Explore option of replacing a mini-van with a flex-fuel 4-wheel drive or other fuel efficient all wheel drive vehicle.
- 4) Develop improved disclosure and reporting between Purchasing, Receiving, and campus departments to better coordinate the arrival of freight on campus.
- 5) Develop and publish sustainability conservation measures for Facilities and Campus Fleet.
- 6) Create purchasing policies that coincide with our renewable fuel or energy availability to further our sustainable vision.
- 7) Work with local Bus and Shuttle providers to provide transportation alternatives and communication to the campus community.
- 8) Develop and publish car and safety travel information for the University community.

**2010-2011 GOALS**  
**Finance & Facilities**  
**Purchasing/Post Office**

The objective of the Purchasing Office for fiscal year 2011 is to focus on the efficiencies of the internal processes and other systems that directly support the campus, its employees, and the community. To achieve this, all departmental personnel shall direct significant efforts to improve their effectiveness in response times to requests, improve order tracking, monitor delays with on-line requisition processes, and develop a method to determine the overall usefulness of the Purchasing Office to the University. The goal of this effort is to ultimately improve the value of the purchasing operation by a measurable level. This effort will be directed, though not limited to, at the following activities:

- 1) The length of time involved to process both paper purchase and on-line requisitions through the purchasing process. Each paper requisition shall be time stamped when received to Purchasing and again when the purchase order is released to the vendor. For on-line requisitions, an electronic report will be generated which will reflect the actual processing time. These times will be logged into a file and periodically evaluated for improvement.
- 2) Specific requests for adjustments to purchasing cards shall be tracked and logged into a file with the intent to improve the processing time required to make those changes.
- 3) Tracking the amount of time taken by vendors, upon receipt of a Purchase Order, to deliver the goods and materials. From that data, changes to processes will be developed and implemented to improve any deficiencies or delays.
- 4) A method shall be developed that will evaluate the effectiveness of the Purchasing Office as it relates to its mission to support the campus. Using the preceding data as well as other measureable criteria, a gauge will be implemented and measured monthly to assess improvement. Each employee shall be involved in this development and have share of the responsibility. The outcome is to recognize a significant increase in the level of support given to the campus.
- 5) The Surplus Property operation will be evaluated in its entirety; response times to pick-up request will be reviewed, material handling and disposing processes will be assessed, and on-line auctions will be increased.

**2010-2011 GOALS**  
**Finance & Facilities**  
**Internal Auditing**

- 1) **Complete 2010 Audit Plan.** The 2010 Audit Plan contains the audit committee-approved schedule of Internal Audit for the 2010 calendar year. At this time, the audit plan seems somewhat optimistic and assertive, but I remain committed to completing all of the audits set forth in that plan, along with any special reviews or assignments that may occur.
- 2) **Continue to enhance my personal knowledge regarding Higher Education operations.** By attending the Association of College and University Auditor's Annual Meeting, continuing to meet and discuss operations with individuals around campus, participate in webinars and other training opportunities, and reading industry publications I will continue to grow my knowledge base of Higher Education operations, including Banner.
- 3) **Complete Master's of Public Administration Degree.** Throughout fiscal year 2010, I have been taking courses to complete my MPA degree. I believe this degree will help me adapt my business-related education to the University and Government environment.
- 4) **Continue building Internal Audit department.** Ideally this will include obtaining approval and funding for an Auditor I/II position. Regardless of that position, I would like to continue building the Internal Audit Department, either through additional internship opportunities, a "guest auditor" program utilizing other employees on campus to assist in certain reviews, or develop and suggest a shared-auditor plan with Dixie State College. A shared position with Dixie would give them audit coverage (currently, they have no auditor), as well as increase SUU's audit coverage, with a minimal cost to both institutions.
- 5) **Publish a quarterly Internal Audit newsletter.** The purpose of this newsletter will be to share with campus (or a select group of employees) the results of value-added reviews that have taken place, share suggestions for strengthening internal controls at the department level, advertise the services of Internal Audit, and generally strengthen the department's relationships with the University.
- 6) **Continue Individual Professional Development.** Through webinars and other training opportunities, I will continue my own professional development, including in areas such as written and oral communication, presentation skills, and other "soft" skills that will allow me to be more efficient as an Internal Auditor.