



LEARNING LIVES FOREVER

2008-2009

Goals and Objectives

Administrative and
Financial Services

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Vice President & Chief of Staff

- 1) *Continue high standards in maintaining a beautiful campus while incorporating sustainability measures as a model for the community and the [higher ed] industry.*
- 2) *Complete work on the Campus Master Plan and Campus Utilities Master Plan projects.*
- 3) *Develop a more comprehensive Information Technology security policy and procedures process, along with appropriate documentation.*
- 4) *Continue phased implementation of VOIP technology, based on funding availability.*
- 5) *Continue to move software systems to Richfield Disaster site and configure a redundant storage area network at the site. Improve the speed and quality of the encrypted connection between the two sites. Test and document procedures to cut over to disaster site, should it be necessary.*
- 6) *Conduct cost benefit analysis on items within the employee benefits program to ensure maximization of the employee benefits package as a valuable recruiting and retention tool.*
- 7) *Implement required employee background check process in a way that minimally damages employee recruitment efforts while providing the additional campus safety presumed by the act's creation.*
- 8) *Continue to pursue and develop reserve funding equivalent to one year of Utah Summer Games operation, and re-evaluate the sponsorship packages to assure value for potential and existing sponsors.*
- 9) *Work with staff and sports coordinators to develop and enhance the Summer Games medal ceremonies for athletes, fans, and sponsors.*
- 10) *Re-evaluate the Utah Summer Games volunteering program, looking to increase awareness of sport specific opportunities and training.*
- 11) *Through the Budget Office, provide valuable financial planning resources in the preparation and evaluation of new academic program proposals requiring Regental approval.*
- 12) *Assist new hires in campus leadership positions by providing them budgetary information and training that will minimize the learning curve necessary for them to be successful in their new roles.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Vice President & Chief of Staff - Continued

- 13) *Involve key university personnel in the creation of a draft Five Year Budget Model.*
- 14) *Build a case statement of support to present to the Legislature for assistance with construction funding for the new Shakespearean Theatre.*
- 15) *Finalize revisions to the USF By-Laws & Policy Statements, complete work on the Festival Strategic Plan, and garner governing board approval of both.*
- 16) *Continue to explore Utah Shakespearean Festival production calendar options, looking for a more flexible rehearsal and performance schedule which might provide additional time devoted to the artistic process and also meet the needs of Festival patrons.*
- 17) *Meet Festival fundraising goals that will make the operation less dependent upon ticket sales variations.*
- 18) *Produce internal financial statements and financial indicators reports by September 30, 2009. Establish GASB parameters in Banner Finance, allowing for creation of basic financial statements through Banner software, rather than through a spreadsheet process.*
- 19) *Reinvent the accounts payable and employee travel authorization/reimbursement processes, looking to streamline the processes; adding value at each step and making them more user friendly.*
- 20) *Review the surplus property program with an eye towards a more efficient and effective disposition of goods submitted.*
- 21) *Continue to improve customer satisfaction with the campus [student recruitment] tour process.*
- 22) *Continue to work towards increased enrollment of specifically targeted populations (ex: graduate students, ethnic minority students, non-resident & international students).*
- 23) *Successfully integrate the Registrar's Office as part of the Enrollment Management team. (The Registrar's Office joined Enrollment Management on August 1, 2008.)*
- 24) *Participate in an electronic transcript exchange in order to better serve students.*
- 25) *Continue focus on employee compensation & professional development.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Facilities Management

Facilities Management Administration

- 1) *Provide user-friendly, web-enabled access for Utility Consumption and Cost Trend Data Tracking.*
- 2) *Conduct internal facilities condition assessment self-evaluation during the year and report findings.*
- 3) *Improve Facilities Departmental knowledge by having each manager work within another facilities departmental area during the year.*

Facilities Management Business Operations

- 1) *Work with newly hired Customer Service Specialist to implement customer service training plan. The focus of this plan will be to improve the Call Center Operator procedures for assisting callers and to improve the customer service of our front line employees. Work with Customer Service Specialist and Managers to implement the new work order system - Sprocket.*
- 2) *Develop a process for entering expenses into the new work order system so at any given time a report can be generated showing how much was spent on a particular work order or in a particular building.*

Utilities Services

- 1) *Steam tunnel safety improvements:*
 - a) *Install communication boxes which will call the campus Call Center in the event of a tunnel emergency.*
 - b) *Improve underground egress by installing manhole covers that can be removed from the inside.*
- 2) *Seismic Gas line protection:*
Install automatic shut off valves that will isolate SUU's master meter natural gas system from Questar in the event of a magnitude 5.5 or greater earthquake to reduce the incidence of natural gas related fires and explosions.
- 3) *Replace pressure reducing valves and large steam valves in Heat Plant to allow for effective oil operation and campus zone isolation.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Facilities Management - Continued

Grounds and Gardens

- 1) *Update Grounds department Greenhouse and landscape area around it.*
- 2) *Develop student crew training checklist for safety/duties/tools and equipment accountability.*
- 3) *Refine Excellence in Grounds and Gardens presentation and present in September.*
- 4) *Add more granite pathways (where needed).*
- 5) *Replace chain link fence between softball field and football field.*
- 6) *Continue to expand campus tree farm.*
- 7) *Continue high standards in maintaining a beautiful campus.*

Building Maintenance and Renovation

- 1) *Update MSDS affecting Building Maintenance Shop. Include all information on website allowing easy access for staff. Implement a procedure to ensure that any new product used on a regular basis is added to the system.*
- 2) *Improve campus concrete by ensuring every batch meets design standards. Test compaction of soil, slump of concrete, and break test. Upon delivery of concrete, calculate percentage of fly ash to ensure it is 15% or less. Record and file all information associated with concrete mix and tests. Replace 50 yards of deteriorated concrete throughout campus, starting with safety items.*
- 3) *Implement the parking lot signage phase of the Exterior Signage Master Plan with completion of ADA parking and reserved parking; and update parking lot entrance signs in all main campus parking lots.*

Custodial Services

- 1) *Green Cleaning: Continue testing environmentally-friendly products and look to expand products into additional buildings.*
- 2) *Develop Inventory Control and Measurement: Work with the Sprocket system to develop a system which is user-friendly while allowing users to better track resource delivery to each building, with a component which will allow staff to view chemical inventory and equipment inventory available, with a short description of what each product is used for.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Facilities Management - Continued

- 3) *Staff Development: Encourage additional cross-training of supervisors to help with dispersing of responsibilities.*

Construction Services

- 1) *Continue to update the contractor, consultant, architect, and engineer database on the Facilities Management web site.*
- 2) *Create a system, with binders for each project, using Management Guide documents, communications and all other obtained documents in a chronological format to aid future project organization, and any others asked to track projects and project information.*
- 3) *Take at least one training course to update skills on current safety or building codes.*

Space Planning, Safety & Risk, Fire Marshal

- 1) *Inspect University facilities and grounds to determine areas of safety and liability exposure, and find solutions to these problems.*
- 2) *Through participation in the Risk Management incentive programs, receive the maximum amount of insurance premium credits available.*
- 3) *Review and verify the accuracy of building data including the CFI inventory database and insured building and content values.*

Motor Pool & Receiving

- 1) *Implement an on-line payment system for Automotive Resources, Inc. (ARI) maintenance reimbursements.*
- 2) *In accordance with the Governor's Energy Efficiency Initiative, promote campus-wide transportation efficiency measures. Ways to promote efficiency may include teleconferencing, ride-sharing, and carpooling when feasible.*
- 3) *Initiate communication to the campus community via campus media and organizations regarding safe travel, preventative maintenance, along with other safety and fuel efficient driving practices.*
- 4) *Provide options to replace standard mid-sized sedans with hybrid or other fuel efficient vehicles.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Associated Vice President for Information Technology

Information Technology Administration

- 1) *Continue to work with the CIO's from the other higher education institutions in the State of Utah in order to petition the legislature for funding for Information Technology. Prepare and submit reports on the utilization of the funding.*
- 2) *Conduct Surveys of various campus constituents in order to better evaluate the Information Technology needs of the campus.*
- 3) *Align goals and actions of Information Technology staff with the mission of SUU.*
- 4) *Keep SUU administration informed of Information Technology needs and achievements.*
- 5) *Inform the campus constituents of new advances in Information Technology, and provide assistance in the implementation of desirable advances.*
- 6) *Guide the development of a security policy and procedures and other related documents.*
- 7) *Align the financial resources of Information Technology for the advancement and improvement of campus technology services that will make us competitive or superior to our peer institutions, and deliver a quality service to faculty, staff and students.*
- 8) *Provide educational opportunities for professional staff to enrich their jobs and increase their technical knowledge, thus positioning them to provide higher quality service to students, faculty and staff.*
- 9) *As new campus projects are proposed that will require information technology resources, develop a screening and priority process that will determine resources needed, implementation time-line, benefit to the university, and services that will be provided to faculty, students, and administration.*

Administrative Systems

- 1) *Continue to maintain stable Banner Environment while maintaining patches and new releases. Monitor performance and proactively address problems.*
- 2) *Develop new reports and reporting systems to be deployed campus-wide. Continue process of developing a comprehensive financial reporting system.*
- 3) *Continue to move non-banner systems to Richfield Disaster site. Test and document procedures to cut over to disaster site.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Associated Vice President for Information Technology -Continued

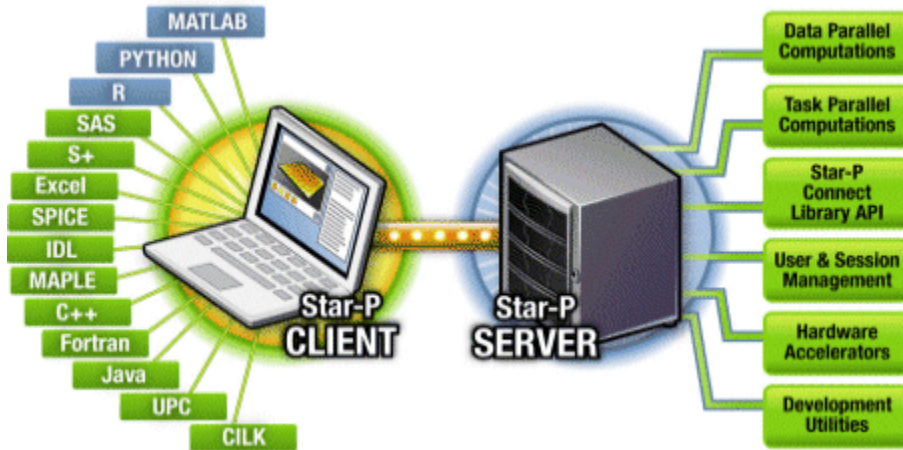
- 4) *Continue to encourage, if not mandate team collaboration. Bring non-IT systems people into our collaboration system, beginning with Financial Aid and Admissions.*
- 5) *Ensure PCI Compliance –move all e-commerce work-stations into secured sub-net. Continue to move other e-commerce servers into protected subnet including Blackboard, Book Store, Summer Games, and Shakespeare Festival. Install and implement Touchnet MarketPlace*
- 6) *Install and implement initial phase(s) of comprehensive Identity Management System in order to use single-sign-on with more secure passwords.*
- 7) *Purchase and implement encryption tools in order to encrypt any sensitive information stored on personal computers, network drives, lap-top computers or portable storage devices.*
- 8) *Continue to add features to mySUU. Create a Portal committee that will prioritize new features. Publicize and roll-out Portal Features.*
- 9) *Participate in the implementation of Adirondack housing software. Includes purchasing of hardware, software, training, and building Banner interfaces.*
- 10) *Participate in the implementation of Advancement Researcher's Edge software. Includes purchase of hardware, software, training, and building Banner interfaces.*
- 11) *Participate in the implementation and purchase of Dialvision system.*

Networking Services

- 1) *Continue to maintain Server Environment while maintaining patches and new releases. Monitor performance and proactively address problems.*
- 2) *In conjunction with Administrative Systems, implement the beginning phases of an Identity Management system.*
- 3) *Configure a redundant storage area network (SAN) at the Richfield disaster recovery site. This will involve mirroring the SAN in Cedar City so that email, home directories, and numerous other campus services will be redundant in the event of a disaster.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Associated Vice President for Information Technology - Continued

- 4) *Implement Star-P on the high-performance compute cluster. The Star-P open software platform delivers revolutionary results to scientists, engineers and analysts by enabling them to transparently use high performance computing resources, using familiar desktop tools.*



- 5) *Promote SUU's high-performance compute cluster and foster relationships with the University of Utah and Utah State University. Give SUU a presence at SC08 this fall.*
- 6) *Standardize labs to provide a consistent end-user experience regardless of lab. Provide software that is currently only available in TH124 to other labs on campus.*
- 7) *Improve lab communication via the web by providing more relevant information.*

Web Services

- 1) *Update the present web server.*
- 2) *Complete migration to Blackboard Learning System CE 6.*
- 3) *Improve the overall security of the web environment by researching web site security to identify common web exploits, and indicate what can be done to prevent those vulnerabilities from being exploited. Part of the research would include how to scan the SUU site and proactively take steps to improve security.*
- 4) *Develop procedures for regularly conducting content audits to check for pages that might have personal or sensitive information that shouldn't be on the public web site.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Associated Vice President for Information Technology - Continued

- 5) *Develop and implement a disaster recovery plan for the web environment, include the main SUU site, and the campus LMS.*
- 6) *Improve web calendaring environment to reduce burden on employees in campus scheduling positions, as well as making calendar data more accessible and compliant.*
- 7) *Implement a better system for news and press releases.*
- 8) *Redesign the home page to better promote news and events on campus utilizing new calendaring and news systems.*
- 9) *Make more strides in developing mobile content.*
- 10) *Continue redesigning and advancing the design/coding of all departments on campus to meet compliant coding standards.*

Classroom Mediation

- 1) *Work at improving communications between The Media Technician and departments, faculty, staff and the administration.*
- 2) *Continue to install control systems in rooms and put the control systems on line for better management of the systems.*
- 3) *Continue to offer training on use of the equipment to faculty.*
- 4) *Continue to improve Media support to faculty, students and staff.*
- 5) *Continue to upgrade existing classroom equipment and install new mediated classrooms as needed.*
- 6) *Continue to encourage the administration for an annual operational media budget for the upkeep of equipment.*
- 7) *Gain more training this year at infoComm. (The Media Technician will be attending infoComm this year in Las Vegas, NV.) Seminars he will be taking part in this year are:*
 - *Control System Programming*
 - *Cooling Audio/Video installations*
 - *The interactive Classroom & Campus: 2008*
 - *Best Practices for Evaluating Digital Signage*
 - *Digital Video in A/V Systems Today and Tomorrow*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Associated Vice President for Information Technology - Continued

- 8) *Assist Public Safety with the implementation of an emergency alert system on Campus.*
- 9) *Assist departments with the implementation of a digital signage display system for each department.*
- 10) *Maintain the new Bell Tower/Carillon and keep it working well.*

Networking Infrastructure

- 1) *Continue to maintain stable Network Environment while maintaining patches and new releases. Monitor performance and proactively address problems.*
- 2) *Participate in developing a disaster plan that can be implemented to utilize the disaster recovery site in Richfield if a need arises.*
 - a) *Implement (test) the above mentioned disaster plan by actually failing over to Richfield. This will point out flaws or oversights in the plan for necessary corrections.*
 - b) *Replace VPN (virtual private network) equipment between SUU and Richfield to improve the speed and quality of the encrypted connection connecting the two sites.*
- 3) *Participate in developing security policies and procedures and other related documents.*
- 4) *Install a second firewall for additional network protection.*
- 5) *Move all servers accepting credit card transactions to the E-commerce subnet on the firewall, and create a new subnet on the firewall for E-commerce users (workstations) accepting credit cards.*
- 6) *Complete the implementation of the first phase of Voice over IP (telephone service) and, to the level of funding available, start the implementation of the second phase.*
- 7) *Replace outdated building infrastructure with new category 6 cables and jacks.*
- 8) *Install new network switches in buildings as needed.*
- 9) *Make sure new building projects have properly designed networks.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Human Resources

- 1) *HR Office Staff Development*
 - a) *Take advantage of the CUPA-HR Learn Key HR online development courses and webinars to maintain and increase the level of HR expertise.*
 - b) *Cross train employees to perform recruitment, employment, and benefit work.*
 - c) *Evaluate current HR staff responsibilities and possible reassignments.*

- 2) *Employee Staff Development*
 - a) *Gather and publish information on University training opportunities for University employees.*
 - b) *Expand the current benefits/payroll orientation to include a general orientation for new staff employees at the time of hire. Transition to a semi annual new staff luncheon to be held in February and August of each year.*
 - c) *Increase the level of communication with University hourly and adjunct employees.*
 - d) *Research and propose a new training module for harassment training.*

- 3) *Customer Service*
 - a) *Research and propose a new customer service program to aid in the recruitment and retention of students and employees.*

- 4) *Recruitment*
 - a) *Identify new recruitment sources and techniques to reach active and passive job seekers.*
 - b) *Create employee testimonials for the University web site.*
 - c) *Create pod casts to market employment opportunities.*
 - d) *Implement employee background checks and prepare for e-verification of social security numbers.*
 - e) *Research, and implement if applicable, the confidential reference letter option in People Admin.*

- 5) *HRIS*
 - a) *Implement new electronic hourly hiring system in Banner Self-Serve.*
 - b) *Develop and implement new electronic overload & special appointment forms in Banner Self-Serve.*
 - c) *Develop a more streamlined process for job descriptions and performance evaluations.*
 - d) *Establish a Banner Help-Desk to answer user questions and provide training. Coordinating BOF sessions for employees to learn more about how to use Banner. Have a different BOF/training (Banner HR/Payroll, Banner Finance, Self-serve every three months.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Human Resources

- 6) *Benefits*
- a) *Conduct a cost benefit analysis of the benefit program to insure the maximization of employee benefits package as a valuable recruiting and retention tool.*
 - b) *Develop a new 403(b) document to meet the new 403(b) regulations that go into effect on 01/01/09*
 - c) *Assist in the expansion of the current University wellness effort.*
 - d) *Work with Insurance Committee to release an RFP for medical and dental insurance.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Utah Summer Games

- 1) *Continue to pursue and develop reserve funding for one year and to re-evaluate the sponsorship packages to assure value for potential and existing sponsors.*
 - *Cultivate and reinforce current sponsorship partners*
 - *Secure new partnerships and acquire new sponsors*
 - *Be proactive with our product so sponsors gain a real value with their partnership with the games*

- 2) *Establish and activate a proactive board of commissioners for future planning.*
 - *With the assistance from the president and others, we will secure an active and working Board made up of professionals that will give us the vision and foresight as it pertains to athletics and business*
 - *Members to include: Lawyers, Doctors, representatives from professional sport franchises, and others professionals*

- 3) *Work with staff and coordinators to develop and enhance the medal ceremonies for athletes, fans, and sponsors.*
 - *Presentation of the Medals must be enhanced in many sports*
We must evaluate the process in which the awards are presented
 - *Focus on the athletes and their accomplishments and dedication to make the trip to Cedar City and leave them wanting to return in the future*

- 4) *Establish basketball referee camp for the basketball portion of the games to enhance the value of the product for our teams to compete in the tournament.*
 - *To secure the future of the basketball tournament in June we must establish a quality refereeing pool. To change that trend, we will be working diligently to offer a referee camp through a basketball conference supervisor to recruit and provide training for referees to secure a positive playing environment for the teams and a working relationship with local and statewide athletic organizations i.e. (Southern Utah Officials Association).*

- 5) *Further establish a relationship with the Wendy Woods Memorial Rodeo committee to continue ongoing participation with the rodeo.*
 - *Should the weekend be changed for the rodeo and could not accommodate the closing ceremonies, have a plan in place for closing ceremonies and develop a strategy to continue opportunity for our athletes and families to attend the rodeo as an additional activity for them while competing in the games.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Utah Summer Games

- 6) *Develop a new marketing campaign for athletes and volunteers.*
 - *With the assistance of Color Graphics, a current corporate sponsor, we will be working on a new campaign to personalize our marketing/recruiting campaign to increase interest and continue to recruit our current athletes.*

- 7) *Re-evaluate volunteering program to increase awareness and provide more sport specific opportunities and training.*
 - *Increase awareness and recruitment for volunteers.*
 - *Improve marketing and recruitment for current and potential volunteers.*
 - *Continue to work toward establishing a want and desire for the community to partner in the volunteering opportunities for the games.*
 - *Focus a recruiting and marketing campaign locally and statewide to entice people to participate as volunteers.*
 - *Continue to grow the large groups for their assistance as volunteers, they currently give us the most support.*
 - *Provide more information to potential and current volunteers about the opportunity to choose specific volunteer opportunities they desire.*

- 8) *Building on 2008 success.*
 - *Learn from other organizations, tournaments and states to learn how to better our games.*
 - *Be proactive, be creative, don't be satisfied*
 - *Focus on the quality of the events, more athletes isn't the answer, better competition is the answer which in return will recruit more athletes to Cedar City*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Budget

- 1) *Provide budget variance information to departmental budget managers as necessary. Act as a resource to help managers resolve budget challenges/deficits.*
- 2) *Provide support for implementation of new reimbursement policy for mobile phones, including effective tracking and budgeting of all requested phone stipends.*
- 3) *Become familiar with bond requirements and take a more active role in the creation and monitoring of auxiliary services budgets.*
- 4) *Assist with development and implementation of 2009 budget for the Utah Shakespearean Festival.*
- 5) *Continue development of Budget Office web site.*
- 6) *Research new academic program funding models to gain the expertise necessary to become a value added financial planning resource in the preparation of new program proposals for Regent approval.*
- 7) *Obtain training and involve the expertise of key university employees as necessary to create a draft Five Year Budget Model by fiscal year end.*
- 8) *Assist new hires in leadership positions by providing financial information and training to minimize learning curves while improving customer service.*
- 9) *Enhanced budget analysis and maintenance of non-E & G accounts.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Utah Shakespearean Festival

Festival Administration

Strategic Plan

Complete the Festival's strategic plan within the next three months and present it to the University Trustees for approval by late fall, pending review and OK by the university administration.

Legislative Session

Work with the President, the university administration, the Board of Governors and our own state legislators to build a case statement of support to help fund a [\$10 million] portion of the new Shakespearean Theatre.

Performance Evaluations

Complete performance evaluations and have them on file with the SUU Human Resources Office by the end of the calendar year.

Compensation

Staff compensation is a major concern both for full-time and seasonal positions. Three full-time positions will be targeted for salary adjustment requests. Additionally, fewer scenic carpenters will be employed over a longer period of time, ensuring greater continuity in scenic construction, along with higher compensation levels for those selected for these positions.

Professional Development

Dedicate a pool of funds to allow staff to attend more professional development conferences and workshops in the coming year.

The New Shakespearean Theatre

Complete construction documents and site preparation work in 2009. Work with Fred Adams, the USF BOG, and others to secure the financial and creative energies to realize the new theatre.

Continue to explore options for a more flexible rehearsal and performance schedule

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Utah Shakespearean Festival - Continued

Board of Governors

- 1) *Work to make the Executive Committee of the Board stronger and meet on a more regular basis.*
- 2) *Finalize the revisions to the USF Board of Governors Bylaws and Policy Statement and have the documents ratified by the BOG and approved by the University Administration and Trustees by fall 2008.*
- 3) *Extend current Board memberships for one additional year, while transitioning from the old governing by-laws to the new revised version.*
- 4) *Provide a policy manual outlining the day-to-day roles and responsibilities of the Board. This would include an orientation packet for new Board members and an annual evaluation form for continuing Board members.*

Executive Staff

Facilities and Technology

- 1) *Finish demolition of two homes along College Avenue and properly landscape the new space for Festival patrons until such time as construction on the new theatre begins.*
- 2) *Complete the new addition to the Scenic Studios making if possible for the USF Properties Studios to be adjacent to the scenic elements of production.*
- 3) *Begin construction on the new storage building at the same location, to house all of the property and scenic elements currently stored in the white tent on 300 West.*
- 4) *Remove the white tent from 300 West by spring 2009, making way for additional parking on campus and in time for the 2009 USF summer season.*

Education

- 1) *Hire a full-time administrative assistant with funding provided by POPS, using the position to assist Michael Bahr in the office management of his many educational programs.*
- 2) *Expand the Shakespeare-in-the-Schools Tour by one week to accommodate additional requests from around the region. Use increased performance fees to cover increased expenses.*
- 3) *Continue to develop a model to present first-class children's theatre productions for USF audiences by 2010. It is envisioned that this would be a spring or winter event.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Utah Shakespearean Festival - Continued

- 4) *Continue the very successful Iron County schools out-reach program in 2009 to include Washington, and Garfield counties.*
- 5) *Continue to explore collaboration opportunities with other SUU departments to expand life-long learning for Festival guests.*

Communications

- 1) *Increase audience attendance at the USF by 2% in the coming year.*
- 2) *Continue to work on internal communications within the company. One recent example is the successful launch of The Bard Bulletin; an electronic newsletter is strengthening the ties between USF administrative departments and artists.*
- 3) *Provide more in-depth training on Theatre Manger for our Guest Services and Business office personnel along with SUU Finance Office personnel.*
- 4) *Continue recognition programs to enhance staff morale.*

Finance

- 1) *Track 2009 USF revenues and expenditures with the SUU Banner reports.*
- 2) *Use the talents of BOG Finance committee members to assist the USF Business office in long range forecasting and financial sustainability planning for the company.*
- 3) *Plan to set aside a sum in the upcoming operational budget for addition to the Reserve Fund, recognizing that the current US economic situation requires us to remain cautious in our budgeting.*

Production

- 1) *Work with the Festival administration and seasonal artistic staff to keep productions on schedule and within budget.*
- 2) *Continue to push directors and designers to respond more quickly to production concerns, thereby enhancing overall production quality and the organization's ability to keep quality artists on staff.*
- 3) *Develop a prioritized list of all equipment and infrastructure needs and then build a plan for funding these production needs.*
- 4) *Plan production chronology and season selection further in advance.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Utah Shakespearean Festival - Continued

Development

- 1) *Increase the number of new donors by 10%*
- 2) *Increase the giving level of current donors by 5%.*
- 3) *Increase the fundraising goal to \$90,000 for next year's BOG gala.*
- 4) *Call regularly scheduled meetings with Festival leadership to keep the new theatre fundraising efforts on track.*
- 5) *Complete work on USF 501(c) 3 status.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Financial Services/Treasurer

- 1) *Work with Budget to develop funding models for differing delivery methods of instruction that contain incentives for departments, yet protect the University's support operations.*
- 2) *Present appropriated fund budget scenarios that present impacts of various enrollment assumptions and waiver decisions.*
- 3) *Provide administration with financial analyses, methodologies and options for accomplishing the University goal of creating a residential campus, particularly in respect to Residential Living accommodations.*
- 4) *Provide financial and related statutory, regulatory and policy considerations to the administration for decision-making purposes.*
- 5) *Produce internal financial statements and financial indicators reports by September 30, 2008.*
- 6) *Expand standard and general interest monthly and quarterly reports for the administration that are informational, useful, and interesting that can be produced by end-users.*
- 7) *Re-invent the accounts payable process to streamline vendor payments; increase accuracy in encumbering, liquidating and expending funds; and increasing added value to the process – a continuing goal.*
- 8) *Reinvent the employee travel authorization and reimbursement process – improving user-friendliness, and departmental cost information.*
- 9) *Generate new, more informative and pertinent investment reports.*
- 10) *Complete Finance area policies updates.*
- 11) *Develop expanded role in managing the financial activities of the University Foundation, including the accounting, investing, funds flows to the University, compliance, growth and reporting issues.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Controller

Controller

- 1) *Utilize ARGOS report writing to produce financial reports replacing current spreadsheet reports improving timeliness.*
- 2) *Establish GASB parameters in Banner Finance to allow for creation of basic financial statements through Banner eliminating/reducing the need for the spreadsheet process of creating year-end financial statements.*
- 3) *Scan documents where feasible eliminating storage issues and allowing for attachment to e-mails.*
- 4) *Complete review and update of assigned institutional policies.*

Payroll

Develop Electronic Personnel Action forms for contract payroll (overloads and special appointments), train campus personnel to use the new form and implement it by July 1, 2009.

Accounts Payable

Expand the use of “direct deposit” payments to faculty, staff and eventually vendors.

Accounts Receivable

Enable students to view their student loan accounts and to make payments online.

Inventory

Establish a uniform classification system for identifying fixed assets across campus to allow easy identification of all assets. Update procedures, create reports to be shared with asset custodians on a periodic basis.

Cashier's Office

Implement new billing process along with new late fee structure to improve student accountability and awareness. Reduce the number of late fee write-offs and improve collection of student receivables.

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Controller's Office - Continued

Centrum Ticket Office

Generate additional revenues through ticket stock advertising, SUU event and ticket office promotion and other non-traditional sources to support the move to a new ticketing system (Jump TV) providing more flexibility and a vastly improved web presence.

Mail Services

- 1) *Update office procedures manual.*
- 2) *Develop bench marks to measure accuracy of mail delivery to campus departments.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Internal Auditor

- 1) *Continue development of an Internal Audit Procedures Manual.*
- 2) *Improve documentation of Audit Work Papers.*
- 3) *Enhance the Internal Auditor's education through university courses.*
- 4) *Increase campus awareness of Internal Audit and the External Anonymous Reporting System.*
- 5) *Increase service function to campus departments beyond the audit function, e.g., operational reviews and assessments.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Purchasing

- 1) *Enhance services to the campus:*
 - a) *Develop and sign two (2) local vendor purchase contracts.*
 - b) *Provide leadership and administrative efforts to develop the campus Sustainability **Program through recycling and other conservation initiatives.***
 - c) *Continue to expand the campus training program for the Purchasing process and procedures; this will include maintaining the monthly sessions currently conducted and adding larger, more general opportunities.*
 - d) *Revise internal operating structure of the Surplus Property effort.*
- 2) *Revise the Purchasing Policy to update specific requirements and address ambiguous segments such as the purchase of Gift Cards and related transactions.*
- 3) *Develop a comprehensive Contract (non-purchase orders) tracking and monitoring system to ensure compliance and awareness of specific terms.*
- 4) *Enhance the reporting capabilities through employee development and the utilization of the latest available reporting software applications.*
- 5) *Develop departmental employees through further educational and professional training.*
- 6) *Secure a larger, more accommodating location for surplus property storage and processing. This will allow for the more efficient and effective disposition of goods submitted.*
- 7) *Establish consistency in accuracy and timing of reports to Administration on Purchasing, Surplus, Recycling and Sustainability.*
- 8) *Complete degree and terminate interim status.*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Enrollment Management

Admissions – Recruitment

- 1) *Continue to improve customer satisfaction from beginning to end of the campus tour process.*
 - *Have Admission Counselor over tours for each day, come to front at 10 AM and 1 PM to distribute packets and visit with prospective students - provide exceptional service.*
 - *Update tour presentation to reflect new publication style [August 2008].*
 - *Have all staff members sit in on another team member's tour presentation each semester.*
 - *Create a checklist of things "to do" before visiting campus on website and confirmation emails.*
 - *Create training Ambassador tour guides [August 2008].*
 - *Video tape each staff members presentation for evaluation [August 2008].*
 - *Provide notebook for use during campus tours [August 2008].*

- 2) *Enhance campus event programs by increasing attendance by 10% and improve yield rates by 2% at the Senior Expos and Overnight events. Maintain attendance and yield rates from Distinguished Scholars Day and Leadership Weekends.*
 - *Incorporate incentive for attending an event and completing evaluations [September 2008].*
 - *Continue to use tele-counselors to promote campus events.*
 - *Post a photo slideshow of participants on the web shortly after each event.*
 - *Create ways to contact individuals who registered but did not attend the event, for the purpose of rescheduling a future visit [October 2008].*
 - *Incorporate more staff during closings of each event.*
 - *Create new workshops [Student life in 3-D, SUU from A-Z] [Fall 2008]*

- 3) *Continue and Improve Graduate Recruitment Plan and efforts to increase graduate enrollment*
 - *Create a graduate recruitment committee that consists of students, faculty and staff [Fall 2008]*
 - *Create graduate testing information on the website [August 2008]*
 - *Cross train office personnel in regards to graduate information [July 2008]*
 - *Include video of Alumni or Dean on graduate web page [November 2008]*
 - *Encourage programs, who don't already, to organize departmental orientations [Spring 2008]*
 - *Create Poster with tear offs for each grad program [by 2008August]*
 - *Look in to advertising in industry specific publications [Fall 2008]*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Enrollment Management - Continued

- *Enhance the graduate communication plan by adding a prospect section [by 2008August]*
 - *Create a graduate postcard [by 2008August]*
 - *Finish program booklets for each gradate program [Fall 2008]*
- 4) *Continue to improve transfer day attendance and overall effectiveness.*
- *Provide easier web access [August 2008].*
 - *Explore an innovative visit options [August 2008].*
 - *Develop an articulation website [Ongoing].*
 - *Increase advisor collaboration for on campus advisement [Ongoing].*
 - *Increase marketing efforts for transfer days through mailings, emails, and personal invites [Ongoing].*
 - *Develop an effective, timely, and detailed communication plan [August 2008].*
- 5) *Increase the pool of transfer student prospects and inquiries.*
- *Utilize prospect strategies to build prospect pool [Fall 2008 & Spring 2009]*
 - *Target students in their freshman year at the junior college level [Ongoing].*
 - *Increase marketing and advertising efforts targeting international students [Ongoing].*
 - *Develop relationship with international advisors [Ongoing].*
 - *Increase marketing and advertising efforts to reach out-of-state Navajo populations.*
 - *Continue to increase articulations and relations with College of Southern Nevada.*
 - *Change freshman info in SRAQUIK when they indicate they are attending a junior college.*
 - *Explore matching Snow College scholarships [Fall 2008]*
 - *Explore recruiting trips to Eastern Arizona College & Mesa Community College [August 2008]*
- 6) *Continue to be innovative with the Admissions Website/Technology.*
- *Create innovative online initiatives for prospective students [Thunderground, T-Time, T-Zone, T-Club, My SUU Spot, My Zone, My T-Bird Nation] [August 2008]*
 - *Create profile pages for each Admission Counselor [August 2008]*
 - *Create Major pages on the web. [August 2008]*
 - *Look into YouTube, how is SUU using this medium to our advantage? [July 2008]*
 - *Communicate Admission Counselors travel schedule well [Ongoing]*
 - *Create all e-mail/text messages during the summer [including proofed] [August 2008]*
 - *Create a inter-office web form for last minute e-mail/text requests [August 2008]*
 - *Create new on-line campus tours [Fall 2008]*
 - *Create on-line tour presentation [Fall 2008]*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Enrollment Management - Continued

- *Add a prospective student calendar to the university web calendar [Summer 2008]*
 - *Create a system to send happy birthday e-mails to prospective students-design SUU Birthday card [Summer 2008]*
- 7) *Improve yield rate of ACT #1's by 3%. Improve ACT #2's by 2%.*
- *Pull reports monthly by territory and region. Post reminders in Groupwise.*
 - *Acknowledge receipt of all test scores received. [Ongoing]*
 - *Target 1's and 2's. [Ongoing]*
 - *Territory managers will create specific initiatives to focus on this group of students [August 2008].*
- 8) *Continue efforts to increase the proportion of men enrolling at SUU.*
- *Use market research in the design of recruitment communication to increase the appeal to prospective male students [September 2008].*
 - *Develop extra touches.*
- 9) *Continue to increase the number of ethnic minority students who enroll at SUU.*
- *Increase faculty/staff of color at open houses [December 2008]*
 - *Add a Hispanic day in the fall [August 2008]*
 - *Explore certification requirements/process for Spanish [June 2008]*
 - *Add an Open House in strategic areas [December 2008]*
 - *Work to translated key items into Spanish [Summer 2008]*
 - *Explore ways bring AVID/ETS groups to visit [Fall 2008]*
- 10) *Increase the number of out-of-state students.*
- *Develop alumni open houses in strategic areas [May 2008]*
 - *Target out-of-state counselors when in target areas. [September 2008]*
 - *Put out-of-state counselor packet in the communication plan [July 2008]*
 - *Put an article in the alumni magazine about "cottage meetings" [Fall 2008]*
 - *Do more office training on residency, SB20, & WUE - Add to Dean's Days [Fall 2008]*
 - *Focus Recruiting/Marketing on tuition and fees of competition [Ongoing]*
 - *Early phone calls in the fall to out-of-state students [Fall 2008]*
 - *Work with VP of University Relations to advertise in strategic venues [Summer 2008]*
 - *Target students from outside Utah who come on a tour for Ambassadors [Ongoing]*
 - *Focus on developing out-of-state market.*
 - *Create a post card for California market [use big campus picture/include people] [Fall 2008]*

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Enrollment Management - Continued

- *College Fair Plus blow-out [create banners with college majors, each college buy a booth] [Fall 2008]*
- *Increase inquiries from key areas. [Summer 2008]*

11) *Increase enrollment of International Students.*

- *Work with International advisors to arrange campus visits with international transfer students.*
- *Continue to strengthen relationships with Korean contacts. [Ongoing]*
- *Develop relationship in key markets around the world. [Ongoing]*

Admissions – Processing

1) *Use resources to empower all staff in providing improved customer service.*

Take advantage of training opportunities on and/or off campus. Review office manuals and documentation for accuracy, consistency, and comprehensiveness. Become more involved in state organizations thereby creating a network of statewide resources.

2) *Improve interaction with customers through training and ownership.*

Continue training for existing and new staff with customer service expectations and techniques. Investigate available training materials, including the video 'Not my job' created years ago by SUU staff.

3) *Improve reporting and technical support.*

Better utilization of the report request form which allows staff to be specific in their needs when requesting reports, lists, etc. Receive training in SQL and Argos reporting tools which will facilitate the development of Argos reports for on demand use by the recruitment staff.

4) *Expand services offered to other departments.*

Continue to provide a high level of service to other departments while developing improved processes to meet their needs. Specifically, services provided to the graduate programs will continue to evolve and become more seamless.

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Enrollment Management - Continued

Financial Aid and Scholarships

- 1) *Streamline responsibilities of the office through cross-training.*

We will ensure that each position in the office can be covered by at least two people, thereby creating a continuous flow of work if one person is absent, and also providing two expert resources for students, parents, and campus colleagues.

- 2) *Enhance our “Clean Office Policy” to protect student privacy.*

We will continue to improve our current Clean Office Policy by providing additional storage spaces for documents in transition (between scanning and shredding, awaiting back-up) as well as shred additional years from our storage area.

- 3) *Surpass current Early Awareness efforts about financial aid and scholarships and offer additional resources.*

We will evaluate the number of contacts we made during the 07-08 academic year and make additional contacts to both new students and current students during 08-09. Goals will be established for each month using prior year data and we will combine our efforts with the recruitment team to reach those goals. Additionally, we will work to train our TRIO and high school guidance counselors about the policies, procedures, and benefits of financial aid, establishing ourselves as experts with the expectation that all questions and concerns of students and parents will be referred to us.

- 4) *Target freshmen in our loan processing efforts.*

Target freshmen at each Orientation event to encourage early completion of the loan counseling process. This will be in addition to our postcard/e-mail reminders. We will also reserve a computer lab during the Week of Welcome to invited freshmen to come in and complete any portion of the aid process that has not yet been completed.

- 5) *Encourage students to be involved in the legislative process.*

As students express concern over financial aid processes we will inform them of the legislation behind the regulations. We will invite them to contact their representatives and provide cards with the contact information for Utah and Nevada representatives and a link where they can find addresses for any other representatives.

2008-2009 GOALS & OBJECTIVES
Administrative & Financial Services
Enrollment Management

- 6) *Better utilize Argos to facilitate financial aid and scholarships processes.*

As Banner becomes more familiar to us, we will continue to use what we can of that system. We will also, however, add Argos to our processes to facilitate reporting and awarding.

Registration and Records

The Registrar's Office joined Enrollment Management on August 1, 2008.

- 1) *Participate in an electronic transcript exchange to serve student better*

Partner with the National Student Clearinghouse to receive and send electronic transcripts from institutions in Utah.

- 2) *Enhance convenience for students who visit the Registrar's website*

Develop a completely online process for students to obtain transcripts from SUU.