

Financial Affairs Goals for 2006-2009

Goal #1 – Strengthen and deepen a customer service commitment

Objective 1.1 Maintain a knowledgeable & informed staff

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Maintain continuous open communication, both written and verbal	Informed staff, transparency	# of complaints	Vice President for Financial Affairs	Ongoing	Email Minimal resources	Online forms
Support academic initiatives	-Improved university relationship -Understanding other departments	# of committees represented	All staff	Ongoing	Time	
Provide annual training on financial aid	Better understanding of Financial Aid	Fewer calls transferred	Office Coordinator	May 2007	Three ½ hour staff meetings Trainer	
Develop an online calendar system for student services office	Informed staff	Usage # of events	Office Coordinator	Ongoing		Evaluate quarterly
Provide additional mission/Lasallian initiatives	Informed staff	Training takes place	Vice President for Financial Affairs	Annually	Trainer	

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Goal #1 Strengthen and deepen a customer service commitment

Objective 1.2 Provide good customer service

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Provide regular customer service training	Informed staff	Make training available	Vice President for Financial Affairs	Annually	Trainer or workshop fees	
Evaluate convenience and accessibility of services	Evaluate/assess services (customer satisfaction)	Forum or survey	Vice President for Financial Affairs	May 2008	Time	
Investigate more online services	Online payment capabilities	Customers paying online with cc	Vice President for Financial Affairs	Spring 2007	Banks fees Time to investigate	Start conversations with Wells Fargo in August 2006

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Goal #1 Strengthen and deepen a customer service commitment

Objective 1.3 Work as a team

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Continue to develop shared projects	More efficient use of time	Complete projects on time without external (contracted) help	Vice President for Financial Affairs	Ongoing As needed	Down-time	Assisted Development & Central Services Summer 2006
Look for cross-training opportunities	Better informed employees Enough back-up on all positions	Employees are able to take time off when they want	Controller	Ongoing	Clear designation of back-ups	
Implement an annual retreat	Team building	Retreat takes place, satisfaction survey	Vice President for Financial Affairs	Once per year	Meeting place Closing office	

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Goal #1 Strengthen and deepen a customer service commitment

Objective 1.4 Promote a positive image of the University

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Provide prompt, accurate, complete information and services	Satisfied customers	Survey	Vice President for Financial Affairs	Ongoing	Time	
Delivery of processes right the first time (correcting entries)	Accuracy Minimize rework	Rework	All Staff	Annually		
Promote professional image	Professional communication, customers feel respected	Number of complaints	All staff	Ongoing	Trainer	

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Goal #1 Strengthen and deepen a customer service commitment

Objective 1.5 Communicate regularly with Saint Mary's Community

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Provide training on Business Office procedures	Inform new customers of policies and procedures	Attendance at forums	Vice President for Financial Affairs	Ongoing	30 minute training sessions, open forum or with departments	August 2006 during faculty/staff 1 st week (2 attended)
Provide Vice President updates and community forums	More involved community	Attendance at forums	Vice President for Financial Affairs	Quarterly and semester	Email updates Open forum Time and space	
Provide prompt communication of changes	Customers are informed. Communicate internally before information goes outside the university	# of internal issues learned from external report	Vice President for Financial Affairs	Continuous	Email	

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Goal #2 Promote SMU community spirit

Objective 2.1 Be active in our Lasallian community; look for more connections with SMU community.

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Sponsor a night at an athletic event	Increase spirit and attendance at athletic events	Participation	Spirit Committee	Ongoing	Prizes, funds, pick events to attend, advertise, challenge and attend	September 2006 (23 attended)
Training – “How to build relationships with students”	Student retention	Retention rate	Student Service Coordinator	Annually May 2007	Trainer	

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Goal #2 Promote Saint Mary's University community

Objective 2.2 Encourage community volunteering

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Promote socialization with peers	Increase attendance at social events	Attendance at picnic, dinners and other events outside of work	All staff	Ongoing	Entertainment Funds	
Volunteer at SMU events	Become more visible in the SMU community	Participation in plays, volunteering, Gifts For Winona	All staff	Ongoing		

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Goal #3 Identify and promote a human resource agenda for the University that includes management, wellness, policies and staff development.

Objective 3.1 Strengthen our wellness programs, using both education and incentives as a way to improve the quality of life and productivity of all our employees

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Host Benefit Expo with health fair or wellness program (booths, TIAA/CREF), HealthPartners, etc.)	Better informed employees with regard to benefits	Attendance at Benefit Expo	Director of Payroll & Benefits	Every two years	Time Money Space	August 2006
Create year-end benefit summary	Better informed employees	Surveys	Director of Payroll & Benefits			May 2009
Provide ergonomic training	Train staff	Schedule training	Director of Payroll & Benefits Office Coordinator	Annually	Trainer Expert	November 2006
Promote Health Assessment in conjunction with HealthPartners	Healthier employees	Decrease medical costs	Director of Payroll & Benefits	Annually	Incentives to complete assessment	

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Goal #3 Identify and promote a human resource agenda for the University that includes management, wellness, policies, and staff development

Objective 3.2 Create and implement policies and procedures for staff development and training

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Undertake regular reviews of pay equity	Pay equity achieved	Look at comparable positions and salaries	VP for Financial Affairs w/help of compensation task force	Annually	Time Committee members	1 st review completed September 2006
Assess process of performance evaluations for all employees	Uniform staff evaluations	Number of employees evaluated	Director of Payroll & Benefits, General Council	Annually November		
Encourage and expand training opportunities	More knowledgeable employees	Less outsourcing	VP Finance	Ongoing	Training funds	
Create an employee orientation program (checklist/mentor)	Easier transition to SMU	Turnover rate Survey	Director of Payroll & Benefits	May 2008		
Create system to update and review policies	Accurate & current policies	Employees use of current policy	Office Coordinator	Annually	Time	

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Goal #4 Provide a safe, attractive, efficient, well-maintained environment to support the University's activities

Objective 4.1 Activate and empower Facility Planning Committee

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Include a faculty member on classroom sub-committee	Greater input and participation	Faculty on committee	Vice President for Financial Affairs	Summer 2006		Completed August 2006
Committee will regularly tour campus	First hand understanding of all facilities	Number of tours	Vice President for Financial Affairs	Annually		
Involvement with prioritizing and budgeting for capital improvements	Greater participation in planning process	Number in attendance at meetings	Vice President for Financial Affairs	Monthly		

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Goal #4 Provide a safe, attractive, efficient, well-maintained environment to support the University's activities

Objective 4.2 Provide appropriate facilities and environment to support our teaching and learning agenda

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Upgrade classroom furniture to meet the active learning environment	Appropriate learning space	Academic department Forums	Classroom committee	May 2009	Budget	
Evaluate and improve signage (look through the eyes of a visitor)	Ease of use for visitors	Fewer complaints	Facility Committee	May 2008	Budget	
Assess use of common spaces for student collaborative learning	To determine need for change	Number of collaborative learning spaces	Facility Committee	May 2008	Budget	

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Goal #4 Provide a safe, attractive, efficient, well-maintained environment to support the University's activities

Objective 4.3 Provide attractive physical space

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Address exterior mold issues on buildings	Clean attractive buildings	Number of buildings washed	Director of Physical Plant	Ongoing	Budget	
Complete a walk around with administrators to identify small projects to improve aesthetics	Variety of ideas for campus improvements	Number of issues noted	Vice President for Financial Affairs	Annually	Budget	
Enhance landscaping	More attractive campus	Number of improved gardens	Vice President for Financial Affairs	Ongoing	Budget	
Renovate freshman residence halls	Attractive rooms for better retention	Number of rooms filled	Vice President for Financial Affairs	May 2009	Budget	St. Edwards 2005 Benilde 2006

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Goal #4 Provide a safe, attractive, efficient, well-maintained environment to support the University's activities

Objective 4.4 Provide facilities and services that respond to student and staff needs

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Develop a three year Facilities Plan that responds to student and staff needs; prioritize major initiatives within budget constraints		Plan implemented	Vice President for Financial Affairs	May 2008		
Assess accessibility of laptop tools (wireless, battery swaps, outlets)	Wireless available campus-wide	Laptops can be used throughout the campus	iT Director	May 2008	Budget Time	Dorms are all wireless (except villages) Summer 2006

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Goal #5 Create implement and monitor a technology plan

Objective 5.1 Implement goals identified in Technology Plan

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Identify training needs and expand services to meet these needs	Better trained employees		Director of Information Technology		Trainers	
Expand network capacity and web services			Director of Information Technology			
Create list of priorities for funding	Prioritize plan and coordinate with budget committee	Prioritized	VP Finance Director of Information Technology	January 2006		
Communicate plan to the university	The university is informed about plan	Fewer requests for plan	Director of Information Technology	November 2006	Time	

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Goal #5 Create implement and monitor a technology plan

Objective 5.2 Periodically review plan relevancy

Operational Initiative	Desired Outcome	Measures	Person Responsible	Time-line	Resources Required	Progress/Status
Technology committee will meet quarterly to review progress of plan	Review progress in previous plan and write new plan	New plan is written	Technology Planning Committee	November 2006		
Communicate results of plan to the university	Send update regarding progress on previous plan	Update sent	VP Finance iT Director	November 2006		
Update/rewrite plan prior to 2008	New plan written by May of 2008	Plan written and communicated	Technology Planning Committee	May 2008		