

CALIFORNIA STATE UNIVERSITY SAN MARCOS
Finance and Administrative Services
2016-2017 Strategic Objectives
Quarter 3

PROCUREMENT & SUPPORT SERVICES

Accounts Payable/Travel

| FAS Strategic Objectives | Department Goals | Progress |
|--|---|----------------------|
| Develop workforce strategies | Provide Sales & Use Tax training to six AP staff | ● On Target |
| | Revising Desktop Procedures and Cross Training Staff | ● On Target |
| | Recognize staff at all hands meeting by 6.30.17 | ● On Target |
| Create and refine innovative business practices | Implement online travel management system | ● Behind Target |
| | Implementation of upload of Library invoices in collaboration with FSO and Library. | ● On Target |
| | As a Part of the FAS 5-year Plan, Review and Revise Employee Move & Relocation and Executive Travel Policies & Procedures | ● Approaching Target |
| Deliver legendary service | In response to the FAS Customer Satisfaction Survey, Procurement & Support Services sub-division will create and deliver Procurement & Support Services 101 training five times by 6.30.17. | ● On Target |
| | Update Accounts Payable & Travel website to include five helpful tools for end-users | ● On Target |
| | Formalizing standards for providing legendary service | ● On Target |
| Identify new and strengthen existing partnerships to support the campus community | Establish collaborations with Procurement to improve five business processes | ● On Target |
| | Training Divisions on online travel system | ● Approaching Target |
| Foster a culture of sustainability | Implement online travel management system eliminating the use of paper | ● Approaching Target |
| | Initiate a communication plan for suppliers to be paid via ACH vs check to minimize the amount of checks printed | ● On Target |
| | AP Staff to being using BOX for saving files rather than printing (i.e. check run, check registers and control groups) | ● On Target |

CALIFORNIA STATE UNIVERSITY SAN MARCOS
Finance and Administrative Services
2016-2017 Strategic Objectives
Quarter 3

Distribution Devices and Property Control

| FAS Strategic Objectives | Department Goals | Progress |
|--|---|----------------------|
| Develop workforce strategies | Cross Train 2 members of staff on new monthly billing procedures for Postage by 12.31.16. | ● Approaching Target |
| | Recognize staff at all hands meeting (one for each strategic objective - five per meeting) by 06.30.17. | ● Approaching Target |
| | On Board Distribution & Property Control Services Lead by 6.30.17. | ● On Target |
| Create and refine innovative business practices | Assess, process Map, and recommend a revised business practice to open and inspect received packages by 6.1.17 | ● On Target |
| | Prepare draft revision of the Distribution Services University Policy by 6.1.17. | ● Behind Target |
| Deliver Legendary Service | In response to the FAS Customer Satisfaction Survey, Procurement & Support Services sub-division will create and deliver Procurement & Support Services 101 training five times by 6.30.17. | ● On Target |
| Identify new and strengthen existing partnerships to support the campus community | Strengthen relationship with campus Safety, Risk Department by attending safety courses and by updating knowledge for DOT mandated training by 6.30.17. | ● On Target |
| Foster a culture of sustainability | Partner with the College of Business Administration students to identify sustainable procurement opportunities through the completion and presentation of the students sustainability project as part of their Business Sustainability 474 course 12.31.16. | ● On Target |

CALIFORNIA STATE UNIVERSITY SAN MARCOS
Finance and Administrative Services
2016-2017 Strategic Objectives
Quarter 3

Procurement and UCP

| FAS Strategic Objectives | Department Goals | Progress |
|--|---|----------------------|
| Develop workforce strategies | Improve knowledge and skills: Introduce twelve new or revised procedures related to ICSUAM policy 6.30.17. | ● On Target |
| | Cross train two team member in Public Works by 6.30.17. | ● On Target |
| | Recognize staff at all hands meeting (one for each strategic objective - five per meeting) by 06.30.17. | ● Approaching Target |
| Create and refine innovative business practices | OnBase Phase 2 will refine the OnBase implementation by reviewing all old/active agreements from the shared drive and migrating them into OnBase by 6.30.17. OnBase is a contract tracking and document management software that will allow for procurement files to be kept and accessed electronically. | ● On Target |
| | Prepare draft revision of the Procurement & Support Services University Policy by 6.1.17. | ● Approaching Target |
| Deliver Legendary Service | In response to the FAS Customer Satisfaction Survey, Procurement & Support Services sub-division will create and deliver Procurement & Support Services 101 training five times by 6.30.17. | ● On Target |
| | Create/development and publish two online business process tutorials by 6.30.17. | ● On Target |
| Identify new and strengthen existing partnerships to support the campus community | Strengthen relationship with Events & Conference Services (ECS) and Campus Risk Manager by holding three strategic and process meetings and to outline streamlined processes and procedures and outline roles and responsibilities for each department by 6.30.17. | ● On Target |
| Foster a culture of sustainability | Increase awareness of procurement of sustainable products and practices by 6.30.17. | ● On Target |
| | Partner with the College of Business Administration students to identify sustainable procurement opportunities through the completion and presentation of the students sustainability project as part of their Business Sustainability 474 course 12.31.16. | ● On Target |

CALIFORNIA STATE UNIVERSITY SAN MARCOS
Finance and Administrative Services
2016-2017 Strategic Objectives
Quarter 3

| UARSC | | |
|---|---|----------------------|
| FAS Strategic Objectives | Department Goals | Progress |
| Develop workforce strategies | Desktop Procedures - All regular tasks should have a documented desktop procedure stored in Box | ● On Target |
| | Cross training – Department should be able to continue performing basic functions when individuals are out/busy | ● Approaching Target |
| | Recognize staff at all hands meeting | ● Approaching Target |
| Create and refine innovative business practices | Process Improvement - Improve workflow and efficiency by reviewing processes | ● Approaching Target |
| | Form revisions and/or confirmation of continued use "as is" - All online forms should be up-to-date and easy to use | ● Behind Target |
| | Online Tutorials/Training - Learning materials should be easily accessible in the form of online trainings | ● Approaching Target |
| Deliver Legendary Service | Standards – formalize standards for customer service for all areas | ● Approaching Target |
| | Survey – develop and administer an online customer service survey | ● Approaching Target |
| Identify new and strengthen existing partnerships to support the campus community | Create Partnerships | ● On Target |
| | Meetings | ● On Target |
| | Merger - complete SMCOR & UARSC merger | ● On Target |
| Foster a culture of sustainability | Mitigate Waste - Cut down on waste materials created and excessive resource usage | ● On Target |
| | Online Forms - Implement online forms and signatures to reduce paper usage | ● On Target |
| | SCOP - Certification of all individuals and departments in Sustainable Cougars Office Program by 6/30/17 | ● Approaching Target |