

**Division of Finance and Support Services
FY 07-12 Strategic Plan
Texas State University-San Marcos**

| | Univ. Goal | Goals/Objectives/Tasks | Status | Cost and source of resources | Assessment | Target Completion | Lead Department | Unit Leadership |
|---|------------|--|---|---------------------------------------|--|-------------------|--------------------|-----------------|
| Enhance our customer service focus by continuously reviewing our core processes and implementing new services. | | | | | | | | |
| Improved core processes | | | | | | | | |
| 1.a.1 | | The shuttle and parking systems will work together to establish a coordinated strategic approach to both parking and transportation on and around campus. This will include current forms of transportation as well as new initiatives including; pedestrian friendly walkways, bike paths, encouraging park and walk, and eventually commuter rail. Update 11/07 \$1.5M Bike Path Grant has been secured. | ongoing | unknown | continued high satisfaction with the program and decreased vehicular traffic on an around campus | FY 07-12 | Auxiliary Services | Root |
| 1.a.2 | | Continue to review the Bookstore POS system and anticipate either replacement or upgrade of the current system in the next 3 years. Continue to work with our on-campus partners and allow them to share in the annual bookstore surpluses further enforcing the importance of a successful store. Continue to grow the new Bookstore/ASG Scholarship stressing the importance that money spent here, stays here. Update 11/07 FY 07 contribution \$29,000 FY 08 contribution \$45,000 Continue to be vigilant in watching the Texas Legislative body so that they do not pass laws that give our off-campus competitors an unfair business advantage. Update 11/07 Successfully defended our right to compete and there was no negative legislative action in the 07 Session. | | | | FY 07-12 | Auxiliary Services | Root |
| 1.a.3 | 6.5 | Integrate positions into salary budget -- that is truly budget by position. (added FY 08) | in progress | time plus consultant already budgeted | process works as intended | FY 10 | Budget | Thyberg |
| 1.a.4 | 6.5 | FAS - Fully implement Budget Development Module, pilot Budget Development on web | partially complete | time plus consultant already budgeted | process works as intended | FY 08-12 | Budget | Thyberg |
| 1.a.5 | | Develop and publish a comprehensive Project Management Manual with detailed instruction on project development processes consistent with the newly adopted TSUS planning and construction policies and procedures. (new for Fy 07) | delayed until FY 08 pending update of TSUS policies | none | completion of project management manual | FY 08 | Facilities | Fogarty |

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| 1.a.6 | | Consolidate fire alarm services and testing services under one vendor. (new for FY 07) | contract awarded and funded | none | contract completed | FY 08 completion | Facilities | Fogarty |
| 1.a.7 | | Expand the electronic delivery of services in all Financial Services areas. | ongoing | | | FY 08-12 | Financial Services | Ondreyka |
| 1.a.8 | | Written documentation will be reviewed and updated and/or developed for all major business processes. (All areas of Financial Services) | ongoing | none | documentation will be complete and updated as necessary | FY 08-12 | Financial Services | Ondreyka |
| 1.a.9 | | Disseminate information about the benefits of using TXMAS and Group Purchasing contracts as "best value" procurement processes to be considered and used in lieu of competitive solicitations to obtain goods and services to meet their needs whenever practical. (Purchasing) | ongoing | none | increased use of TXMAS and Group Purchasing contracts | FY 07 | Financial Services | Ondreyka |
| 1.a.10 | | Begin trial implementation of granting end-users on-line access to Procurement Card vendor software, SmartData On-Line (SDOL). Will expand implementation campus-wide in a systematic, staged manner if the trials are successful. (Purchasing) | Library/Athletics are currently in pilot. New functionality in SAP Procurement module to have this process in SAP not JP Morgan | | | FY 07 | Financial Services | Ondreyka |
| 1.a.11 | | Improve the SAP Annual Inventory reports to be more user-friendly and revise the inventory process, as needed. (Materials Management) | partially complete | | | FY 07 | Financial Services | Ondreyka |
| 1.a.12 | | Study the feasibility of implementing bar-code scanners for use by campus community in conducting annual inventory and for use by Materials Management in conducting audits of inventory. (Materials Management) | | | | FY 08-12 | Financial Services | Ondreyka |

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| 1.a.13 | | Investigate options and determine best method to capture Contract Management information in database (Contract Compliance) | Gathering data on 3rd party software. | unknown (cost of software) | third party software selected | FY 08 | Financial Services | Ondreyka |
| 1.a.14 | | Configure and implement Contract Management database (Contract Compliance) | | unknown (maintenance cost for software) | database created and maintained | FY 09-10 | Financial Services | Ondreyka |
| 1.a.15 | 6.5 | FAS - Implement new FI and HR modules such as: Travel Module and PCR Entry on Line, implement workflow | workflow completed for requisitions SAP ongoing project to implement Travel and Expenses module | no dollars, only time | New Modules are functional | FY 07-12 | Financial Services/HR | Ondreyka McBride |
| 1.a.16 | | Where possible, paper transactions should be migrated to an electronic, paper-less environment - SAP Project 07-0228 for Electronic W-2's has been initiated and scheduled for completion by December 2007.C35 | transmittals to/from Budget Office are electronic | unknown | paper transactions are eliminated | FY 07-12 | Financial Services/HR /Budget | Ondreyka, McBride, Thyberg |
| 1.a.17 | 6.5 | Reorganize and administer the university's human resources program upon implementation of the SAP HR modules. (Add Communications Specialist/Coordinator to research, develop, and administer a communication program to effectively reach all university employees. Will educate faculty and staff on HR policies and procedures and provide timely notices for information and compliance) (Add Recruiting Specialist/Coordinator to research, develop, and administer a recruiting program to produce applicants that can meet the needs of the University) (Evaluate the need for a SAP Liaison to provide an HR interface with the SAP system and SAP internal organization that will permit HR to effectively meet its functional responsibilities within the SAP environment.) | ongoing | unknown | documentation for processes | FY 07 | Human Resources | McBride |

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| 1.a.18 | | Consolidate all staff human resources functions into Human Resources consistent with recognized current HR theory - move Professional Development function and staff to HR from Provost/VPAA Division | requires discussion with Provost | \$45,000 + benefits for full time Training Specialist | function and staffing added to HR | FY 08 | Human Resources | McBride |
| 1.a.19 | 6.2 | Change from a Biennial Salary Survey to an annual survey to better assess the labor market pay levels for university staff positions and secure adoption of a compensation policy | in progress | none | annual surveys and Cabinet adoption of compensation philosophy | FY 08 | Human Resources | McBride |
| 1.a.20 | | Redesign EASY website (added FY 07) | in progress | none | updated EASY website in compliance with university requirements | FY 07-08 | Human Resources | McBride |
| 1.a.21 | 6.5 | Continue to reorganize and administer the University's human resources program as required to implement SAP HR modules and new functionalities. (includes establishing a Master Data Center which includes Payroll with Human Resources to consolidate and provide more efficient PCR, Payroll, and Master Data services to the campus) | MDC in HR finalized, to be implemented 11/1/07, Payroll and Faculty Records not part of the MDC | Career Services employee to move to HR, new employee approved, need replacement employee for Roxie, space to be renovated with HEAF | MDC functional as of 11/1/07 | FY 07-08 | Human Resources | McBride |

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| 1.a.22 | | Update records retention schedule, purge appropriate documents, and explore document imaging | in progress | unknown | updated retention schedule, document purges in compliance with schedule, documents imaged | FY 07-08 | Human Resources | McBride |
| 1.a.23 | | Submit proposal to Cabinet to require certain performance standards for particular positions (e.g., SAP Skills for administrative assistants, accounting staff, etc.) | no action | no dollars | Cabinet adopts standards | FY 07 | Human Resources | McBride |
| 1.a.24 | 6.2 | Improve retention and recruitment of high quality staff employees by assuring the University Pay Plan is competitive. | Local Market/Method: \$420,000/all: \$674,216 local market adjustments applied 5/1/07, university market adjustments to be applied 11/1/07 | cost for pay plan adjustments unknown | implement pay plan adjustments to market levels | FY 07-12 | Human Resources | McBride |
| 1.a.25 | | Make at least one liaison/outreach visit each division and college council to educate faculty and staff on HR policies and procedures and provide opportunities for input on HR policies and procedures | ongoing | no cost | HR policies and procedures shared with divisions and college councils | FY 07-12 | Human Resources | McBride |

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| 1.a.26 | 6.6 | FAS - (a) AS IS Documentation in 07, (b) Selection and (c) implementation of Student System consistent with project plan. Student Business Services and Planning/Space Management offices involved | As Is Documentation in progress | cost unknown, funds being set aside in reserve by Budget Office | new System is purchased, implemented, and functioning as intended | FY 07-12 | Treasurer, Planning/Space Management | Van Vlack and Nusbaum |
| 1.a.27 | | Identify and implement a building and room inventory database system to ensure accurate reporting and ease of reporting. | charter written | cost unknown, institutional funds will be requested | system is implemented and functioning as intended | FY 07-12 | Planning/Space Mgt | Nusbaum |
| 1.a.28 | 6.5 | Establish a FAS training registration system via the web. Fill System Support Specialist II position to maintain registration system (added FY 08) | in progress | salary for System Support Specialist II (funding identified) | registration system established | FY 08 | Planning/Space Mgt | Nusbaum |
| 1.a.29 | 6.5 | Create and offer SAP training programs to the campus community. | Budget Office has individual training in place | none | Training programs are routinely being offered | FY 08-12 | Budget, Financial Services | Thyberg and Ondreyka |

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| 1.a.30 | | All students, faculty, and staff will receive their ID cards in a timely and effective way that is convenient for them and fits their schedule. (ID Services) (added FY 08) | | | Adjust office hours and maintain flexible schedule that allows for staff coverage when needed. Continue to assess hours of operation through survey and working with departments to solicit feedback concerning hours of operation. | FY 08-12 | Auxiliary Services | Root |
| 1.a.31 | | Make the Bobcat Bucks program one of the most highly utilized in the state and country. ID Services (added FY 08) Continue to add vendors and currently we have nearly 60 off-campus vendors in the program. Cash Deposits continue to increase from year to year. FY 09 we will get a fee increase from \$3 to \$5. | | | Continue to work with Wells Fargo and others to promote the program with an aggressive marketing program that highlights the benefits of the program. Continue to add services to the card that will make it more attractive for students to put money on their accounts. Work with new student orientation to show that using Bobcat Bucks is the way to do business at Texas State. | FY 08-12 | Auxiliary Services | Root |

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| 1.a.32 | | Continue to look at new ID Card Systems so that we can become aware of the most cutting edge technology available to our students, faculty and staff. ID Services (added FY 08) | | | Attend professional development meetings and national conferences to learn of new systems and new functions for the ID Card. Work with university access control to be sure we are working together in all functionalities of the ID Card. | FY 08-12 | Auxiliary Services | Root |
| | 6.5 | FAS - automate carry forwards and reserves | Complete | no dollars, only time | process works as intended | FY 07 | Budget | Thyberg |
| | 6.5 | FAS - Implement ERP 2005 upgrade (existing functionality) | complete | no dollars, only time | Upgrade complete, conducted lessons learned | FY 07-08 | Budget/Financial Services/Human Resources | Thyberg, Nusbaum, McBride |
| | | Update construction contract "Special Conditions" which address unique construction contracting requirements for the Texas State campus. (new for FY 07) | complete | | | FY 07 | Facilities | Fogarty |
| | 6.5 | An SAP Procurement "HOW TO" training guide will be distributed to requisitioners and departments to aid in preparing SAP documents. (Purchasing) | completed | | | FY 07 | Financial Services | Nusbaum |
| | 6.5 | Work collaboratively to coach SAP End Users on "shortcuts" and productivity enhancement techniques in preparing purchasing documents in SAP. (Purchasing and Accounts Payable) | completed | | | FY 07 | Financial Services | Nusbaum |

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| | | P-card policies and procedures will be reviewed to determine how well the P-card program meets the customers' needs, while maintaining adequate financial controls. The P-card manual will be revised and training materials will be updated. (Purchasing) | completed | | | FY 07 | Financial Services | Ondreyka |
| | | New services will be implemented to meet the needs of our customers | | | | | | |
| 1.b.1 | | The Round Rock Higher Education Center should anticipate space in a new building for a dedicated Bookstore of approximately 1,500 sq ft. Additional storage space will be needed as well. Departments have declined to have a Bookstore | | 1500 asf x \$250 gsf | Bookstore constructed | FY 11 | Auxiliary Services | Root |
| 1.b.2 | | Expand on our already robust shuttlebus system that now includes daily routes to Austin and San Antonio. These routes now accept per ride fairs and are open to the public. Continue to work with the City of San Marcos, CARTS, and TTI to establish a coordinated transit system for the entire City | ongoing | | | FY 07 - 12 | Auxiliary Services | Root |
| 1.b.3 | | The Print Shop/Duplicating Services will shift to a 100% digital delivery of product and services. More and more of our jobs will be submitted via the internet making our operation more easily accessible and far more efficient. | | | | FY 07 - 12 | Auxiliary Services | Root |
| 1.b.4 | | Work with the regional and local planning organizations to promote and participate in the clean air and alternative transportation initiatives for the region. | partially complete | | | FY 06 - 12 | Auxiliary Services | Root |
| 1.b.5 | | Product lines in the Bookstore will continue to be reviewed in order to maximize our financial return to the campus and provide greater financial subsidy to our student, faculty and staff. Update 11/07 Apparell Sales continue to increase helping the stores overall profitability. | ongoing | | | FY 07 - 12 | Auxiliary Services | Root |

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| 1.b.6 | | The ID Services Bobcat Card will continue to expand and add services. In the coming years the services at the on-campus Wells Fargo branch will be expanded as well as add an ATM machine to the Student Center in Summer 08. Laundry Machines in the Residence Halls need to be added as well. We will continue to add to the services both on and off campus that accept Bobcat Bucks. Request a fee increase to \$5 from the current \$3 in FY 2008 to be effective FY 2009. | | | | FY 07-12 | Auxiliary Services | Root |
| 1.b.7 | | Each area will develop a business continuity plan. | complete - EHS&RM, Facilities | none | Plans are developed for each office | FY 07-08 | BSC | BSC |
| 1.b.8 | | Each area will develop and plan to respond to an avian flu outbreak. | Complete - Facilities, SBS, HR has submitted recommended leave policy | none | Plans are developed for each office | FY 07-08 | BSC | BSC |
| 1.b.9 | | Non-Resident Alien Training sessions will be developed by the Payroll Staff in conjunction with the International Office on employment and tax related issues for our students, staff and faculty. (Payroll) | in progress | none | Training Session Customer Surveys will be utilized for viable feedback. | FY08 | Financial Services | Ondreyka |
| 1.b.10 | | Training sessions will be developed which address Contract Management Issues. (Contract Compliance) | partially complete. Contracting Basics PowerPoint Presentation on website. Participating in contract training sponsored by OSP. | none | Training Session Customer Surveys will be utilized for viable feedback. | FY 07-08 | Financial Services | Ondreyka |

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| 1.b.11 | 6.5 | Secure an automated online performance evaluation system to improve documentation of standards and expectations, enhance communication between supervisor, employee, and university administration, and improve flow of documentation through the review process | no progress | unknown | automated online system in place | FY 07-08 | Human Resources | McBride |
| 1.b.12 | | Develop and implement a drug and alcohol testing policy for University staff employees to promote and maintain a safe and efficient work environment | in progress (policy submitted, under review) | \$60-70 per test, employee's dept pays | policy in place, testing occurring | FY 07 | Human Resources | McBride |
| 1.b.13 | | Secure University funding for professional financial advice to employees (Literature surveys indicate most employees do not receive acceptable guidance on how to invest funds in a retirement plan) | in progress | unknown | implementation of financial advising service | FY 08-09 | Human Resources | McBride |
| 1.b.14 | | Secure an automated online job audit process to increase access to the audit process, improve communication of job responsibilities between supervisors and employees, and increase efficiency of the process through instant tracking of job audit requests through the job audit system. | in progress | unknown | implementation of automated job audit process | FY 07 | Human Resources | McBride |
| 1.b.15 | | Establish a temporary services program for staff (to provide a temporary labor pool to cover planned and unplanned staff short duration absences) | funding requested | \$135,000 (Manager, HR Asst., Equipment, Supplies) | implementation of tem service | FY 07-08 | Human Resources | McBride |
| 1.b.16 | | Expand the newly designated Work Life Coordinator position from 20% time to full time in order to provide a much wider program of Work Life services | funding requested | \$8,300 to expand to full time plus unknown cost to transfer Workers Comp duties to EHSRM | full time work life coordinator, Workers Comp moved to EHSRM | FY 08 | Human Resources | McBride |

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| 1.b.17 | | Create a career ladder for university titles to identify career paths and lay the foundation for job related training | no progress | unknown | career ladders identified | FY 07-12 | Human Resources | McBride |
| 1.b.18 | | Secure and implement a tax deferred plan for the President and other highly paid employees (added FY 07) | On hold pending outcome of TSUS executive compensation study. | unknown | Deferred Tax Plan implemented | FY 07-08 | Human Resources | McBride |
| 1.b.19 | | Secure software to produce University organization charts (added FY 07) | in progress | \$25,000 est. | Software implemented | FY 07-08 | Human Resources | McBride |
| 1.b.20 | | Develop written documentation (desk manual and/or policies) related to risk and insurance. (Environmental Health, Safety & Risk Management) | in progress | none | desk manual and policies written | FY 08 | EHS&RM | Dowdy |
| 1.b.21 | | Prepare analysis of insurance coverage needed for "business interruption service" as well as assist with new requirements for Educational & General property coverage. (Environmental Health, Safety & Risk Management) | in progress | none | report generated followed by insurance recommendation | FY 08 | EHS&RM | Dowdy |
| 1.b.22 | | Continue teaching HR supervisor's course (Managing @ Texas State) to better educate faculty and staff on human resources issues. (revised 07) | Two courses for FY '08 with first course September '07. | \$1250 each \$2500 total for materials and lunches | Courses offered | FY 07-12 | Human Resources | McBride |
| 1.b.23 | | Continue to administer the University's staff background check policy. | ongoing | \$1,400 annually for NSNR's | number of checks run | FY 07-12 | Human Resources | McBride |
| 1.b.24 | 6.11 | Develop a walking tour of campus for the web. (new for FY 08 - SACS requirement) | no progress | none | Walking Tour Available via the web | FY 08-10 | Planning/Space Mgt | Nusbaum |

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| | | Develop a comprehensive retiree list to support VPUA communication with retirees (added FY 07) | Complete | none | Retiree list developed, University Directory program modified | FY 07-08 | Human Resources | McBride |
| | | Implement Roth 403b option (added FY 07) | Complete | none | Roth 403b option implemented | FY 07 | Human Resources | McBride |
| | | Develop and implement an indefinite Delivery-Indefinite Quantity (IDIQ) professional services contracts with an Architectural firm, Landscape Architect firm and an Engineering firm for small, quick turn-around projects. (new for FY 07) | Complete | | | FY 07 | Facilities | Fogarty |
| | 6.4 | Teach the new HR supervisor's course (Managing @ Texas State) kicking off in October FY 07 to better educate faculty and staff on human resources issues | complete | none | Course is offered | FY 07 | Human Resources | McBride |
| | | | | | | | | |
| | | The organizational structure and processes of each FSS unit is deemed as meeting the needs of its customers and is supportive of the university mission. | | | | | | |

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| 1.c.1 | | All areas within Auxiliary Services will be viewed as delivering exceptional customer service. (added FY 08) | | | Individual reporting areas will be responsible for establishment measurement tools to track customer service. These tools should not be limited to semesterly surveys but rather on-going continuous improvement tools. | FY 08-12 | Auxiliary Services | Root |
| | | Combine the Mail Services and Print Shop operation at one location RR 12. Service the JCK building 2 times per day for approximately 1.5 hours in the morning and afternoon. Gain efficiencies of combining the two staffs one of which was recently downsized. Create a larger retail space at the on-campus duplicating center in the Nueces Bldg for postage sales and supplies. | complete | | | FY 07 | Auxiliary Services | Root |
| | | | | | | | | |
| Assessment is used for continuous program monitoring and improvement | | | | | | | | |
| 1.d.1 | 3.7 and 6.12 | Conduct a Comprehensive Division Peer Review every 5 years to provide a systemic evaluation process to help the departmental office assess and improve the quality and effectiveness of its services and activities and to make directional changes as needed | assignments made August 07 Retreat, due 2/1/08 | none | self study complete by March 1, 2008, peer review in April 08 | FY 08 | BSC | BSC |
| 1.d.2 | 3.7 and 6.12 | Conduct a VPFSS Customer Satisfaction Survey (added FY 08) | mtg initiated with IR | none | Customer Satisfaction results reviewed and changes implemented | FY 08 | Planning/Space Mgt | Nusbaum |

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| 1.d.3 | 6.11 and 6.12 | Distribute the Environment/Facilities Survey as a follow-up from FY 03 survey (added FY 08 - SACS requirement) | mtg initiated with IR | none | Customer Satisfaction results reviewed and changes implemented | FY 08 | Planning/Space Mgt | Nusbaum |
| | 3.7 and 6.12 | Conduct triennial Customer Satisfaction Survey (to measure customer satisfaction with HR services and need for improvements and new services. | complete | none | completed survey, needed improvements identified | FY 07 | Human Resources | McBride |
| Use of web based communication for the purpose of keeping our customers and stakeholders informed. | | | | | | | | |
| 1.e.1 | | Develop, deploy, and improve informational web pages for the purpose of keeping our customers and stakeholders informed with particular attention in FY 07 to the following units: A) Contract Compliance, B) Payroll, C) Accounts Payable - Travel, D) Student Business Services | Payroll web pages updated, AP Travel web pages updated | none | web pages updated, positive customer feedback | FY 07-12 | BSC | BSC |
| 1.e.2 | | Division and departmental web pages will change to CMS and new institutional format | in progress | none | web page updated, positive customer feedback | FY 07-08 | BSC | BSC |
| 1.e.3 | | FAS web pages will be taken over by FSS Division and converted to new institutional format | in progress | none | web pages updated, positive customer feedback | FY 07-08 | Planning/Space Mgt | Nusbaum |
| 1.e.4 | | VPFSS web pages will provide: the deferred maintenance plan for the current fiscal year, the current year HEAF allocation plan, and the current year Unexpended Plant Fund plan. (added FY 08) | in progress | none | web pages created and updated | FY 08-12 | Planning/Space Mgt | Nusbaum |

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| 1.e.5 | | All areas within Auxiliary Services will be viewed as delivering exceptional customer service. (added FY 08) | | | All Auxiliary Services areas will have user friendly web-sites that allows as much on-line communication as possible. All forms should be available through the department's web-site. | FY 08-12 | Auxiliary Services | Root |
| | | Develop 1098-T form Instructions for Parents and Students to be included in orientation brochures and on the webpage. (Tax Specialist) | Completed | | | FY 07 | Financial Services | Ondreyka |
| | | Update the UPPS and associated webpage instructions and forms for the Contract Services Payment Request process. Also, conduct training sessions about these processes for end-users and back-office staff. (Tax Specialist) | Completed | | | FY 07 | Financial Services | Ondreyka |
| Protect the financial integrity of the university by safeguarding the university's assets, ensuring efficient use of university resources and compliance with regulatory authorities. | | | | | | | | |
| Operations will be managed with available resources | | | | | | | | |
| 2.a.3 | | Implement an annual equipment utilization plan for replacement of obsolete custodial equipment | unfunded | requires funding, \$20,000 annually | reduced spending on repair of custodial equipment | FY 08 -12 | Facilities | Fogarty |
| 2.a.4 | 6.10 | Develop and implement a strategy to to perform fire protection inspections with in-house forces where qualified. | unfunded | funding needed for 2 plumbers, \$50,000 annually | Fire protection inspections are being performend in-house. | FY 08 | Facilities | Fogarty |

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| 2.a.5 | 6.15 | Save 5% electricity each year for the next five years: Upgrade fluorescent lighting in all major campus buildings for energy efficiency, Investigate the Lone Star Program, upgrade the Energy Management System and install selective metering of utility systems on campus | partially complete | Funding requirements to be determined based upon energing study | Measurement of savings | FY 08- 12 | Facilities | Fogarty |
| 2.a.6 | 6.15 | Develop continuity of operations plan/procedures for computer outages | in progress | none | Completed plan | FY 08 | Facilities | Fogarty |
| 2.a.7 | | In order to meet the State Fleet Management Plan we will implement 6 year vehicle replacement schedule. | Ongoing | Funded | Measurement of the age of the fleet over time | FY 08 - 12 | Facilities | Fogarty |
| 2.a.8 | | Improve processes and documentation to assure compliance with state regulations regarding surplus computer equipment, as well as the Comptroller's CAS software system implementation. Requires a new position, Property Management Clerk, for Property Management Office (Materials Management) | ongoing | requires funding for position | | FY 07-08 | Financial Services | Ondreyka |
| 2.a.9 | 6.5 | Maintain SAP Master Data structures to assure accuracy and consistency in FAS Phase 1. | partially complete Ongoing process for vendors and accounts | need additional Accounting Clerk II in FI MDC | FI Master Data Center established in Accounting | FY 08-12 | Financial Services | Ondreyka |
| 2.a.10 | | Texas State executes contracts that meet the needs of the university and monitors performance of those contracts (Contract Compliance) | in progress | | | FY 07 - 12 | Financial Services | Ondreyka |

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| | Univ. Goal | Goals/Objectives/Tasks | Status | Cost and source of resources | Assessment | Target Completion | Lead Department | Unit Leadership |
|--------|------------|---|---|------------------------------|---|-------------------|------------------------------|------------------------|
| 2.a.11 | | Expand electronic delivery of communications, billings, and self-service access where feasible. This includes, but is not limited to, EFT for financial aid, expansion of payroll direct deposit, electronic W-2's and other electronic payment methodologies. (General Accounting, Payroll, Student Business Services) | in progress | unknown | % adoption exceeds average adoption rate | FY 07 - 08 | Financial Services/Treasurer | Ondreyka and Van Vlack |
| 2.a.12 | | Continue to develop HR operational metrics for Texas State and the Texas Higher Education Human Resources Association (THEHRA) to determine return on investment for University policies and procedures | ongoing | unknown | production of metrics | FY 07 | Human Resources | McBride |
| 2.a.13 | | Risk of loss of resources will be minimized by education of the campus community regarding a broad range of risk and safety issues. This will be done via enhancement and implementation of systems, written policies and procedures for the identification, a | ongoing | none | written policies, training development | FY 07 - 12 | EHS&RM | Dowdy |
| 2.a.14 | | Expand and improve the collection, evaluation and maintenance of data related to injuries, claims, worker's compensation, and other risk and safety issues. Such data will assist in minimizing and/or preventing losses from future similar occurrences. (Envi | ongoing | none | analysis of data followed by appropriate training | FY 07 - 12 | EHS&RM | Dowdy |
| 2.a.15 | | Review the current investment policy and revise if needed | policy was revised 11/06; Treasurer will review again for 11/07 | none | policy revised and approved by BOR | FY 07 - 08 | Treasurer | Van Vlack |
| 2.a.16 | | Review endowment files for missing information. Work with the Endowment Compliance Officer in University Advancement to develop MOU's for endowments without MOU's. Review and revise the current policy statement regarding University Endowments. | work has begun to develop MOUs for endowments | none | all endowments have MOUs, policy statement revised and approved | FY 07 - 08 | Treasurer | Van Vlack |

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| 2.a.17 | | Provide support for technology and supplies to enable FSS staff to effectively meet the requirements of their jobs and promote a positive work environment. | ongoing | division HEAF allocation | HEAF funds allocated for capital acquisitions | FY 07 - 12 | VPFSS | Nance |
| 2.a.18 | | All areas managed by the Director of Auxiliary Services will remain fiscally sound and return a surplus or minimally break-even. (added FY 08) | Ongoing | none | Director will provide financial management and support to all areas and alert the VPFSS of any fiscal deficits that could occur. Director will be responsible for developing plans to reduce any fiscal deficits. Director will work with unit managers to insure fiscal solvency | FY 08-12 | Auxiliary Services | Root |
| 2.a.18 | | Director of Auxiliary Services is responsible for communicating to the campus the importance of profitable self-support departments (added FY 08) | | none | To support the office of FSS with additional funds that can be used to supplement E&G budget and other university priorities. | FY 08-12 | Auxiliary Services | Root |
| 2.a.1 | 6.16 | Employ annual budget plan to address all strategic priorities including increased faculty and staff salaries | deleted FY 08 | | | FY 07 - 12 | Budget | Thyberg |
| 2.a.2 | | Develop and implement a base line and incremental funding for operations (non salary) to keep up with inflation and growth (telephone costs from central account, DOE funding formula for academic departments) | Complete | minimal | Process works as intended. Feedback from academic chairs. | FY 07 08 | Budget | Thyberg |

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| | 6.15 | Install a weather station that can be tied into our centralized irrigation controller to automatically adjust to real time evapo transpiration demand to enhance energy conservation if additional funds are provided | Completed | | | FY 07 | Facilities | Fogarty |
| | 6.3 | Establish Construction Inspector and Administrative Assistant positions in FPD&C to meet Campus Master Plan construction schedule. (new FY 07) | complete | | | FY 07 | Facilities | Fogarty |
| | | Construct document storage and archive facility to meet state document retention requirements for construction contracting. (new - FY 07) | complete | | | FY 07 | Facilities | Fogarty |
| | | Increase manpower in Building Maintenance to handle pressure washing of key building and walkway areas on a two year cycle if additional funds are provided | complete | | | FY 07 | Facilities | Fogarty |
| | | | | | | | | |
| | | Improved, accurate and timely dissemination of financial and other information | | | | | | |
| 2.b.1 | | Expand the use of our Geographic Information System to improve operations resulting in accurate, improved information. (added 4/06) | ongoing | none | Accurate, improved information provided | FY 07-12 | Planning/Space Mgt | Nusbaum |
| 2.b.2 | 6.9 | Maintain a five year deferred maintenance plan and improve programming estimates for the projects. | funding increase by Cabinet FY 08 - \$100,000 | requires additional funds | deferred maintenance remains at or below 5% of current plant replacement value | FY 08 - 12 | Facilities | Fogarty |

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| 2.b.3 | | Financial reporting processes will be evaluated and improved to enhance user access and understandability, as well as accuracy. (General Accounting) | Ongoing | | | FY 08 | Financial Services | Ondreyka |
| 2.b.4 | | Centralize contract files for record retention and reporting (Contract Compliance) | | | | FY 07 | Financial Services | Ondreyka |
| 2.b.5 | 6.5 | Working with IT, Financial Services and the Budget Office will establish a Business Data Warehouse with FI data. | planning stage | none | required FI data in Business Warehouse | FY 07 - 08 | Financial Services/Budget | Ondreyka, Thyberg |
| 2.b.6 | | Continue monthly electronic HR Bulletin to all regular faculty and staff (will educate faculty and staff on HR policies and procedures and provide timely notices for information and compliance) | ongoing | none | customer satisfaction feedback | FY 07-12 | Human Resources | McBride |
| 2.b.7 | 6.5 | Working with IT, HR will establish a Business Data Warehouse with HR data. Working with IT, Payroll will also establish a Business Data Warehouse with Payroll data. | in progress | none | required HR/Payroll Data in Business Warehouse | FY 07 - 08 | Financial Services/Human Resources | Ondreyka, McBride |
| 2.b.8 | | Communicate financial information within the division, to the university community, and to external constituents on a timely basis. (added FY 08) | in progress | none | Information will be distributed via FSS Newsletter, BSC and Extended BSC meetings, web site, UPPS, and FSS/PPS, emails and presentations as needed. The VPFSS Office Survey will indicate 85% or higher satisfaction with the manner and timeliness in which the VPFSS Office communicates financial information | FY 08-12 | VPFSS | Nance |

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| 2.b.9 | | Information provided via the Vice President will allow for timely and informed decision-making and planning by others. (added FY 08) | in progress | none | Reports are submitted to the appropriate person within the designated time frame. Reports are submitted to the appropriate person with accurate information. | FY 08-12 | VPFSS | Nance |
| 2.b.10 | | Director of Auxiliary Services is responsible for communicating to the campus the importance of profitable self-support departments (added FY 08) | | none | Through sharing surpluses with other university departments they will understand the value of Auxiliary Service's role on campus. | FY 08-12 | Auxiliary Services | Root |
| | | | | | | | | |
| Fewer exceptions to compliance issues | | | | | | | | |
| 2.c.1 | 6.15 | Continue to work with Dining Services on strategies to reduce the COD and BOD in the water stream. Eliminate or greatly reduce the fines that are currently imposed on us by the City of San Marcos. | | | | FY 07 - 12 | Auxiliary Services | Root |
| 2.c.2 | | Contract processing and approval process will be revised so that original copies of applicable Texas State executed contracts and agreements are kept in a central location (Contract Compliance) | | | | FY 07-08 | Financial Services | Ondreyka |
| 2.c.3 | | Contract processing and approval process will be revised so contract documents will be reviewed to identify issues with T&Cs prior to contract execution (Contract Compliance) | partially complete. Awaiting approval of revised UPPS | | | FY 07 | Financial Services | Ondreyka |

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| 2.c.4 | | Develop program for compliance review of Texas State contracts (Contract Compliance) Hire Contract Compliance Specialist | | funding for Contract Compliance Specialist | | FY 09-10 | Financial Services | Ondreyka |
| 2.c.5 | 5.5 | Our HUB Outreach Program has been defined into to three components: o Education of Staff and Faculty at Texas State - purchasing and contract compliance will support HUB Specialist through improved enforcement of University bidding and award requirements o Marketing of our HUB Outreach Program o Education for current and potential HUB vendors - communication of Texas State procurement process as part of training programs offered to HUB vendors | ongoing | | | FY 07 - 12 | Financial Services | Ondreyka |
| 2.c.6 | | Improve the Accounts Payable processes for identifying and reporting 1099 vendors. (Tax Specialist and Accounts Payable) | ongoing | | | FY 07 | Financial Services | Ondreyka |
| 2.c.7 | 6.10 | Ensure compliance with State Fire Marshal regulations and protection of assets | partially complete and ongoing | unknown | 100% of scheduled assessments completed, 100% schedule training classes completed, satisfactory results of fire marshall review | FY 05 - 12 | EHS&RM | Dowdy |
| 2.c.8 | | Ensure compliance with regulatory requirements, develop comprehensive safety programs (including teaching and research labs), and actively promote and monitor the programs. | complete - inventoried labs | none | random and planned audits followed by training and indoctrination | FY 07 - 09 | EHS&RM | Dowdy |
| 2.c.9 | | Begin a feasibility study of the need for and costs of developing a university-wide industrial hygiene program to address indoor air quality, ventilation, personal exposures to chemicals and biological agents, noise, respiratory conditions and initiate a | in progress and ongoing | none | develop policies and procedures and program specific training | FY 08-10 | EHS&RM | Dowdy |

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| 2.c.10 | | Develop a university wide safety, health and compliance training program to raise the level of awareness of faculty, staff and students in the areas of safety and health. (Environmental | partially completed and ongoing | none | job task analysis, risk assessments followed by training | FY 08-10 | EHS&RM | Dowdy |
| 2.c.11 | 6.11 | Implement new processes outlined in SACS Principles of Accreditation to ensure compliance with standards, while continuously improving overall educational quality. (added FY | in progress | none | compliance with requirements and standards | FY 08-10 | BSC | BSC |
| 2.c.12 | | Explore, recommend, and secure third party administrator contract for ORP and TDA plan administration for compliance with new IRS 403b regulations. | in progress | unknown | third party contract in place | FY 09 | HR | McBride |
| | | Develop, secure and implement a strong validation process for degree requirements and employment testing that meets federal requirements to protect the University from discriminatory/wrongful hiring litigation. | completed | unknown | strong validation process | FY 07 | Human Resources | McBride |
| | | Training sessions will be provided to assure a current knowledge base to minimize processing time and errors for travel reimbursements. Travel Fair will be held. (Accounts Payable) | completed | | | FY 07 | Financial Services | Ondreyka |
| | | The Procurement card (P-card) cardholder training materials will be reviewed and revised, with the new training program implemented in mid-year. (Purchasing) | completed | | | FY 07 | Financial Services | Ondreyka |
| | | Implement a program of on-going, systematic reviews of P-card expenditures and documentation held at the departmental level. (Purchasing) | completed | | | FY 07-12 | Financial Services | Ondreyka |
| Facilities and infrastructure conducive to the overall well being of the students, faculty and staff. | | | | | | | | |
| 2.d.1 | | Negotiate acquisition and disposition of real property, such as, land parcels, easements, and right-of-ways in support of the Campus Master Plan. (added 4/06) | ongoing | none | properties identified, negotiated, and deals closed | FY 07 - 12 | Planning/Space Mgt | Nusbaum |
| 2.d.2 | | Manage income producing property owned by Texas State to individuals, government agencies and university departments (grant funded programs). (added 4/06) | ongoing | none | leases up to date and income receipted | FY 07 - 12 | Planning/Space Mgt | Nusbaum |

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| 2.d.3 | | Work with KTSW to secure another radio tower location. (added 4/06) | all locations identified in FY 07 fell thru | some HEAF funding allocated | tower relocated | FY 08-09 | Planning/Space Mgt | Nusbaum |
| 2.d.4 | | Identify ways to expend funds provided by the Provost for master plan improvements without a dedicated timeline. (added 4/06) | in progress | funding in place | number of projects completed and dollars spent | FY 07 - 08 | Planning/Space Mgt | Nusbaum |
| 2.d.5 | | Conduct space efficiency studies for departments on campus as requested. | College of Education in progress | if done in-house zero cost | completed studies | FY 07 - 12 | Planning/Space Mgt | Nusbaum |
| 2.d.6 | | Review the feasibility of issuing taxable bonds to construct retail space in the Fine Arts Parking Garage. If feasible, solicit RFP's from firms interested in occupying space in the garage (revised FY 08). | no progress | none | feasibility complete, RFP's solicited, contract awarded | FY 08-09 | Planning/Space Mgt and Treasurer | Nusbaum and Van Vlack |
| 2.d.7 | | Complete scheduled preventative maintenance in order to maintain equipment reliability and meet customer expectations for fast response to maintenance issues. | This item enhances current efforts | requires funding, \$225K one-time costs and \$1.03M per year | manufacturers recommended maintenance is met | FY 08 - 12 | Facilities | Fogarty |
| 2.d.8 | 1.10 | Achieve the Association of Physical Plant Administrators (APPA) level II cleanliness standards on campus. | This item enhances current efforts | requires funding (\$40K one-time costs and \$340K per year) | Customer Satisfaction Survey reflects the higher standard is met | FY 08 - 12 | Facilities | Fogarty |
| 2.d.9 | | Upgrade elevators in order to comply with ADA regulations | in progress | funded | Upgraded elevators | FY 07 - 12 | Facilities | Fogarty |
| 2.d.10 | 6.10 | In order to comply with regulations and enhance safety we will upgrade fire alarm systems on campus. | in progress | funded | Upgraded fire alarm systems | FY 07 - 12 | Facilities | Fogarty |

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| 2.d.11 | 6.3 | Adopt environmentally responsible campus design and planning principles to achieve LEED certification (preferably silver certification) | in progress | none | projects achieving LEED certification | FY 07 - 12 | Facilities | Fogarty |
| 2.d.12 | 6.3 | Implement utility master plan. | in progress | funded | utility outages diminish and energy usage per square foot decreases | FY 07 - 12 | Facilities | Fogarty |
| 2.d.13 | 1.10 and 6.3 | Improve campus landscaping to make Texas State look like a premier national institution of higher education | in progress | funded | Customer Satisfaction Survey | FY 07 - 12 | Facilities | Fogarty |
| 2.d.14 | | Eliminate chlorine gas at Jackson water well with safe and effective mixed oxidant system for drinking water sanitation | nearing completion | funded | Project completed | FY 08 | Facilities | Fogarty |
| 2.d.15 | 1.10 | Improve the aesthetics of university buildings by periodically washing windows and pressure washing buildings. | ongoing | funded | Buildings and windows washed | FY 08 - 12 | Facilities | Fogarty |
| 2.d.16 | 1.10 | Improve aesthetics and promote safety by keeping university owned streets in good repair | Awaiting funding | requires funding (\$100K per year) | Streets are repaired | FY 08 - 12 | Facilities | Fogarty |
| 2.d.17 | | Restore the aquatic ecosystem associated with Spring Lake in partnership with the U.S. Corps of Engineers. | Awaiting federal allocation of funds for design and construction | federal funds to be provided, matching funds allocated | ecosystem restored | FY 2010 | Facilities | Fogarty |
| 2.d.18 | 1.10 and 6.3 | Implement the Campus Master Plan and other projects as they arise. | in progress | funding identified | master plan projects completed | FY 07-12 | Facilities, Planning/Space Mgt | Fogarty, Nusbaum |

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| 2.d.19 | | Assist institution in meeting its space needs by locating, negotiating, administering off campus leases including office, laboratory, classroom, and land when requested. (added 4/06) contract compliance | ongoing | | | FY 07 - 12 | Financial Services | Ondreyka |
| 2.d.20 | 6.3 | Work with Biology, Agriculture and Geography faculty to support and develop an on-campus arboretum | on hold | unknown | campus arboretum recognized | on hold | Planning/Space Mgt and Facilities | Nusbaum, Fogarty |
| 2.d.21 | | Assure that equipment is in workable, reliable, safe condition. This is particularly important because of safety issues associated with moving heavy and cumbersome loads, as well as the frequency of use of equipment. This requires on-going update and replacement of warehouse equipment and vehicles. (Materials Management) | ongoing | | | FY 07-12 | Financial Services | Ondreyka |
| 2.d.22 | 6.3 | Provide detailed scheduling to ensure proper implementation of the 2006-2015 Campus Master Plan | CMP Implementation Team meets twice month | no cost | Calendar is maintained and revised as needed | FY 07-12 | Facilities and Planning/Space Mgt | Fogarty, Nusbaum |
| | | Work with The Staubach Company to determine the best strategic real estate plan for the IH35 and McCarty property and solicit proposals for the property. (added 4/06) | complete | none | land sold, quasi endowments established | FY 06-07 | Planning/Space Mgt | Nusbaum |
| Foster an inclusive and supportive environment that values students, faculty, and staff and their contributions to the Texas State community, resulting in increased retention, diversity and improved employee morale. | | | | | | | | |
| Employees in the FSS Division will know what is expected of them, be informed, and receive timely, honest feedback on their performance | | | | | | | | |
| 3.a.1 | | Continuous feedback will be given to employees and annual employee appraisals will be completed on time | ongoing | none | appraisals completed on time | FY 07-12 | BSC | BSC |
| FSS employees should achieve a rating of 300 or above on their performance evaluation appraisals | | | | | | | | |

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| 3.b.1 | | Supervisors will provide continuous feedback to subordinates concerning performance and develop improvement plans when appropriate | ongoing | none | improvement plans created | FY 07-12 | BSC | BSC |
| A systematic training and development program will be in place for each FSS employee | | | | | | | | |
| 3.c.1 | 6.4 | Provide FSS staff with professional development and training opportunities to promote the personal and professional growth necessary to successfully carry out the responsibilities of their positions, including the implementation of the new SAP management system | ongoing | none | listing of prof development opportunites attended by staff | FY 07-12 | BSC | BSC |
| 3.c.2 | 6.4 | Continue to provide internal monthly safety training to employees and provide external training as required to meet proficiency and licensing requirements | ongoing | none | listing of training sessions attended by staff | FY 07-12 | Facilities | Fogarty |
| Division employees will be valued and their achievements recognized | | | | | | | | |
| 3.d.1 | | The FSS Quarterly Team award program will be continued | ongoing | funded | number of teams awarded annually, VPFSS Office satisfaction survey will indicate 85% or higher satisfaction with the award program | FY 07-12 | Planning/Space Mgt | Nusbaum |
| 3.d.2 | | Enhance town/gown relationships by expanding community service activities and implementing a Staff Recognition Award for Community Service in the FSS Division | no progress | none | award implemented | FY 08 | Planning/Space Mgt | Nusbaum |

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| 3.d.3 | 6.1 | Performance award monies will be distributed to BSC and the customer service awards will be named in May at the division picnic | ongoing | funded | number of performance awards distributed, VPFSS Office satisfaction survey will indicate 85% or higher satisfaction with the award program | FY 07-12 | BSC | BSC |
| 3.d.4 | 6.1 | Continue recognizing people throughout the year utilizing the Just-in-Time Awards Program | ongoing | funded | Number of JIT awards | FY 07-12 | BSC | BSC |
| 3.d.5 | | Formally recognize the contributions of the FSS staff in publications such as the university newspaper, San Marcos newspaper, FSS newsletter, etc.) | ongoing | none | number of contributions recognized and in what media, VPFSS Office satisfaction survey will indicate 85% or higher satisfaction with the award program | FY 07-12 | BSC | BSC |
| 3.d.6 | | Recognize FSS employees for their years of service and for retirement with certificate and/or paperweights | ongoing | paperweights funded | number of employees recognized annually | FY 07-12 | VPFSS | Nance |

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| 3.d.7 | | Develop and implement a marketing plan to promote Human Resources (added FY 07) | no progress | unknown | marketing plan implemented | FY 08 | Human Resources | McBride |
| The FSS Division will achieve a diverse workforce | | | | | | | | |
| 3.e.1 | 5.1 | Increase diversity of applicant pools for staff positions through targeted advertising. (Target diversity rich labor markets for recruiting activities to improve the chances to secure qualified diversity applicants) (Secure outside vendor recruiting service and publications that effectively reaches and produces diversity applicants. | ongoing | unknown | number of qualified staff diversity applicants | FY 07 - 12 | Human Resources | McBride |
| 3.e.2 | 5.1 | FSS Division supports university initiatives for increasing diversity by enhancing the diversity of applicant pools through targeted position advertisements | ongoing | unknown | number of diversity candidates identified and source of candidates' knowledge of vacancy | FY 07-12 | BSC | BSC |
| 3.e.3 | 5.4 | Continue support of the FSS Division Diversity Committee | ongoing | | | FY 07-12 | BSC | BSC |
| 3.e.4 | 5.4 | The FSS Diversity Committee will develop a FSS PPS on diversity | in progress | none | PPS approved | FY 06 - 07 | Diversity Committee | Diversity Committee |
| 3.e.5 | 5.4 | The FSS Diversity Committee will develop a code of conduct that describes appropriate workplace behavior for FSS employees | in progress | none | Code of Conduct completed and distributed | FY 06 - 07 | Diversity Committee | Diversity Committee |
| 3.e.6 | 5.4 | The FSS Diversity Committee will provide informative training for managers/supervisors to encourage employees to attend diversity workshops and follow diversity precepts. | ongoing | none | training provided | FY 07 - 12 | Diversity Committee | Diversity Committee |

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| 3.e.7 | 5.4 | The FSS Diversity Committee will disseminate monthly diversity quotes/statistics to FSS employees starting Spring 2006. | ongoing | none | number of quotes/statistics shared | FY 07 - 12 | Diversity Committee | Diversity Committee |
| 3.e.8 | 5.4 | The FSS Diversity Committee will hold a Diversity Lunch Film Series to continue the diversity awareness efforts. (added FY 07) | ongoing | none | film series held | FY 07-12 | Diversity Committee | Diversity Committee |
| The FSS Division will implement strategies to support the institution's efforts with student retention | | | | | | | | |
| 3.f.1 | 3.1 | FSS staff will identify ways to help with the institution's efforts of student retention. Examples are: Work to promote bus information. Provide a commuter breakfast to promote routes. Sponsor student events. Adopt a leadership program. Volunteer to be part of opening of semester events. Advise a student organization. | ongoing | unknown | retention efforts reported annually | FY 07 - 12 | BSC | BSC |
| 3.f.2 | 3.1 | Encourage customer service training for all staff to create a culture of service which recognizes the time constraints of students | ongoing | none | training program created and implemented | FY 07 - 12 | BSC | BSC |
| 3.f.3 | 3.1 | The FSS Division will continue involvement with the Campus Common Experience Program | ongoing | unknown | involvement with Common Experience | FY 07-12 | BSC | BSC |
| 3.f.4 | 3.9 | Employ, to the extent possible, work study and wage students to provide them both financial support and work experience | ongoing | none | students are hired by departments | FY 07-12 | BSC | BSC |
| | 3.9 | Continue to hire at least two interns per long semester to research and develop data for HR policies and procedures | complete | funding available | hired interns | FY 07 | Human Resources | McBride |