Goal 5: Administration – Responsibly steward financial and physical resources

Goal Leader: Vice President of Finance and Administration

**Strategy 5-A: Strengthen planning and budgeting practices to optimize fiscal management and tie budgets to the strategic plan.**

*Action Step 5-A-1:* Develop improved revenue tracking procedures by Department/Center utilizing Cognos in order to increase transparency and improve financial and program planning.

*Action Step 5-A-2:* Provide users with training on Banner, Colleague, Cognos, and Office of Sponsored Programs systems to more fully understand capabilities of all systems and how they interrelate.

*Action Step 5-A-3:* Review annual planning and budget cycle developed in 2014 and recommend revisions to executive committee.

*Action Step 5-A-4:* Identify external support and enhance training opportunities for finance staff and Banner Users Group to improve system understanding, revise practices as needed and embed practices for exceptional financial management in the University.

**Strategy 5-B: Implement a systematic process for facility use.**

*Action Step 5-B-1:* Develop process for facility assignment.

*Action Step 5-B-2:* Review Colleague database to determine process that can be used for tracking facility assignment.

*Action Step 5-B-3:* Annually review facility assignments and square footage.

*Action Step 5-B-4:* Refine and promulgate a process to request and grant of space.

**Strategy 5-C: Review and improve business support services to enhance operations.**

*Action Step 5-C-1:* Improve campus-wide access to reports written outside of the Banner software system, including Cognos.

*Action Step 5-C-2:* Train students, faculty and staff as needed on using Banner, Banner related reports, and Cognos reports, including Purchase Orders and Accounts Payable.

*Action Step 5-C-3:* Review Campus equipment and material purchasing processes to identify opportunities for cost reduction and campus employee satisfaction

*Action Step 5-C-4:* Survey campus community to evaluate level of customer satisfaction with business support, and determine opportunities for improvement.