



Student Financial Services

STRATEGIC PLAN

2017-2021

DIVISION OF ADMINISTRATION AND FINANCE

DEPARTMENT PROGRAM REVIEW PROCESS OVERVIEW

During the Fall of 2015, a new Program Review process and cycle was developed for all Administration and Finance units. The goals of this new process included being manageable in terms of work load and useful to department heads/staff in assessing unit progress and making improvements. In addition, consistency across the division, while allowing for some flexibility based on the wide variety of department functions, was desired. After completing a self-study, VCAF units incorporated stakeholder feedback in the form of a campus review done by the Division Assessment Committee, which is comprised of student, faculty, and staff representatives from within and outside the division. In addition, departments could choose to include an external review component, and incorporate existing assessment efforts, as well as any relevant national standards and/or benchmarking tools. All of these components informed each department's strategic goals, which are targeted for completion during the next four years.

STUDENT FINANCIAL SERVICES INTRODUCTION

Please include an introduction here for your department that outlines your process and timeline for completing the self-study and the development of your strategic plan goals, noting who was involved.

The formal process for the departmental self-assessment began with a meeting on November 4, 2016 in which the members of the Student Financial Services department discussed our independent analyses of the program review categories, and came to consensus on the rankings for the department. At a later meeting on November 30, 2016, the staff determined what the department's Opportunities for Improvement (OFI) would be for each section of the review over the next 3-year cycle. All department staff were involved in this process, including: Steve Medlin, Jacqueline Gatlin, Jesse Rochell, Steve Perucca, Bonnie Bates, Allison Milam, Allison Noel, Fenema Aldas, Kory Bond, Christina Martinez, and Gillian Masters.

DIVISION OF ADMINISTRATION AND FINANCE

DIVISION MISSION

As a partner in learning and through the stewardship of resources, the Administration and Finance division provides innovative programs and services to support the student-centered mission of the University

STUDENT FINANCIAL SERVICES MISSION AND VISION

Enter your department's mission and/or vision statement here.

The mission of the Student Financial Services (SFS) Office at the University of Colorado Colorado Springs is to efficiently enable and assist students and departments in meeting their financial obligations, with a focus on financial integrity and accountability. The SFS Office is responsible for the management of key university financial resources and records, and acts as a central collection point for university receipts. In fulfilling our mission, we promote and support:

- **Customer Service:** We strive to provide helpful, knowledgeable assistance to students, campus departments, and other constituents in a timely manner, and keep their interests in the forefront of our decision making.
- **Diversity:** We respect all members of the community, and strive to support the university's commitment to improve diversity in order to create a supportive and inclusive climate for all.
- **Employee Development:** We value personal and professional development that leads to enhanced quality of life and a positive work experience.
- **Integrity:** We value high standards of ethical behavior. We demonstrate and expect responsibility and accountability.
- **Continuous Improvement:** We promote innovative uses of resources on behalf of our customers, and seek to encourage others to welcome change that results in positive outcomes and improvements.
- **Quality:** We value the consistent delivery of accurate, timely information required by our customers and seek to be proactive in providing services.
- **Collaboration:** We promote the sharing of ideas, teamwork, and communication in support of operations and strategic priorities.
- **Environmental responsibility:** We support the campus commitment to protecting the environment by making process improvements that reduce waste and energy consumption through the use of technology.

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STRATEGIC ADVANTAGES

Please list/describe the strategic advantages of your department here. What strengths do you possess, and what opportunities do you foresee that will support this strategic plan?

Strengths:

- Delivering core services with minimal staff levels as compared to peer institutions (1200 transactions versus 400 transactions per staff member)
- Use of technology to provide a first-class Bill Estimator for use by stakeholders
- Regular use of external professional standards (PCI compliance audit and NACUBO Student Financial Services Benchmarking Survey)

STRATEGIC CHALLENGES

Please list/describe the strategic challenges of your department here. What areas of weakness need attention, and what are the potential threats to be addressed in order to support this strategic plan?

Challenges:

- Create centrally located and documented procedures and processes for all SFS positions
- Increase diversity and inclusion education and training within SFS
- Collect and evaluate stakeholder feedback regularly

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STUDENT FINANCIAL SERVICES STRATEGIC GOALS

PROGRAM REVIEW CATEGORY(IES):

2. Services/Operations

Duplicate the remaining information below for additional goals that are related to this Category.

Goal 1.1: To have each functional area within SFS document and maintain up-to-date processes and procedures for their position and house this information in a shared document that is easily accessible by all SFS staff.

Below, please identify your action steps and the timeframe for implementation/completion of each step. Note: The number of action steps will vary for each goal. Please add or delete rows as needed.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Add this goal to each SFS staff member's performance plan	Supervisors	X			
2. Create location on shared drive to store documents created by staff members	Jacqueline Gatlin	X			
3. Create, and update as needed, documents that list/explain processes, procedures, duties and timelines of when to perform these and place on shared drive	All SFS Staff	X	X	X	X

Please list the outcomes for this goal below. Again, the number will vary for each goal. Please add or delete rows as needed.

Outcomes	How will progress be measured?
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1. To have a process/procedure manual for all SFS positions/functional areas to aid in succession planning and to assist when staff are out of the office.	Staff members will report progress each year during coaching sessions and at year-end during the evaluation process
2.	

STUDENT FINANCIAL SERVICES STRATEGIC GOALS

PROGRAM REVIEW CATEGORY(IES):

5. Inclusive Community

Duplicate the remaining information below for additional goals that are related to this Category.

Goal 2.1: To require all SFS staff to attend a minimum of 4 hours of diversity and inclusion training per year and to include this as a goal in each person's performance plan.

Below, please identify your action steps and the timeframe for implementation/completion of each step. Note: The number of action steps will vary for each goal. Please add or delete rows as needed.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Add this goal to each SFS staff member's performance plan	Supervisors	X			
2. Attend a minimum of 4 hours of diversity and inclusion training per year	All SFS Staff	X	X	X	X
3.					

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Please list the outcomes for this goal below. Again, the number will vary for each goal. Please add or delete rows as needed.

Outcomes	How will progress be measured?
1. Increase diversity and inclusion education and knowledge within the SFS department	Staff members will report progress each year during coaching sessions and at year-end during the evaluation process
2.	

STUDENT FINANCIAL SERVICES STRATEGIC GOALS

PROGRAM REVIEW CATEGORY(IES):

6. Customers/Stakeholders

Duplicate the remaining information below for additional goals that are related to this Category.

Goal 3.1: To provide an opportunity for students and authorized payers to take part in a survey to provide feedback to us so we can continually strive to provide the best quality service possible.

Below, please identify your action steps and the timeframe for implementation/completion of each step. Note: The number of action steps will vary for each goal. Please add or delete rows as needed.

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Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Determine the survey tool to be used	Jacqueline Gatlin	X			
2. Create list of questions to be used in the survey	All SFS Staff	X			
3. Implement survey and feedback tools into SFS processes and collect and evaluate feedback regularly	Jacqueline Gatlin	X	X	X	x

Please list the outcomes for this goal below. Again, the number will vary for each goal. Please add or delete rows as needed.

Outcomes	How will progress be measured?
1. To use provided feedback by stakeholders to continually review process, procedures and quality of customer service and make changes to better serve our stakeholders	By regularly gathering and evaluating feedback from stakeholders, we will be able to gauge if changes we have made to processes/procedures have had the desired effect of improving our quality of customer service.
2.	