



CONTROLLER'S OFFICE

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.

CONTROLLER'S OFFICE INTRODUCTION

Our process began with a meeting Jacque Gatlin and Aaron Burton on November 16, 2017. They explained the objectives of the program review. The Controller shared the documents for the first departmental group meeting by email, and everyone's was tasked with ranking the self-analysis worksheet. At that meeting on November 28, 2017 we gave our score for each category and calculated the average for our overall score for each. Each person was then assigned a section to write on their category for strengths and opportunities for improvements. One member was in charge of putting everyone's sections together to form a cohesive paper. On February 12, 2018 the Controller and Deputy Controller presented to the committee. We gathered once again to work on our goal of having a Mission Statement and to work on our short term and long term goals. Our team included: Carolyn Rupp, Nick Martinez, Mary Lile, Oksana Glushchenko, Brent Utoft, Jessi Komrofske, Lisa Herman-Worley, Melinda Hamilton, Christi Walker and Cameron Flaten.

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.

CONTROLLER'S OFFICE MISSION AND VISION

We believe it is our duty to support the mission of the University by:

- Preparing accurate, timely, and reliable financial statements,
- Providing outstanding customer service,
- Complying with applicable laws and regulations, and
- Providing training, oversight, and management to ensure the integrity of financial transactions.

CONTROLLER'S OFFICE CORE VALUES

We strive to:

- Provide transparency by disclosing of full information required for collaboration, cooperation, and collective decision making.
- Be responsive by reacting quickly and positively.
- Perform ethically by adhering to policies, procedures, laws, and accounting standards.
- Maintain professionalism in all circumstances.

STRATEGIC ADVANTAGES

- One of our strategic advantages is our ability to embrace change.
- Customer Service is part of our mission and we strive to create a welcoming atmosphere.
- We stay updated with continuing education on the latest professional standards.

STRATEGIC CHALLENGES

- Collect and evaluate stakeholder feedback
- Office location at UOP
- Constantly monitoring our web content
- Onboarding process for new financial personnel on campus

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CONTROLLER'S OFFICE STRATEGIC GOALS

PROGRAM REVIEW CATEGORY(IES):

#2 Services and Operations: Onboarding New Employees

Goal 1.1: Improve our onboarding process for new staff, both internal and campus financial users.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Create a welcoming environment for new hires by reaching out to them before their first day. Guide them through the necessary documents that HR needs on file. Explain the process of the Offer Letter.	Supervisor	x			
2. Provide the new employee with UCCS swag (coffee mug and/or water bottle, lapel pin) and have their name tag ready for them on their first day. Walk them around the office building introduce them to everyone with everyone explaining their job duties.	Supervisor or possibly co-worker	x			
3. Take them to lunch at the beginning of their employment.	Department	x			
4. Give the new hire a tour of the campus.	Supervisor or co-worker	x			
5. Provide them with campus/department specific documentation to help them learn our processes. Each department supervisor would need to tailor this to specific tasks. Adding to what we are already providing.	Each department supervisor	x			

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6. In the GL slide deck and on our webpage add pictures of each of us with our contact information.	Department		x		
7. When the GL training is held make an appearance to introduce ourselves. It is not so intimidating to ask someone for help when you know who you are asking.	Coordinate with Trainer/Dept.	x			
8. Offer new employees hired within department more one on one with myUCCS portal website and its content and processes.	Supervisor	x			
9. Controller to send an email to new financial employees welcoming them and giving them information about our office.	Controller	x			

Outcomes	How will progress be measured?
1. New employees will know who each of their co-workers are and the beginnings of work connections will be formed.	Progress is measured by the new employee's response to the co-workers emails. Examples: Did the new hire respond? Was it a favorable response?
2. Creating a feeling of being part of the team/University	By employee response
3. Creating relationships on campus and within our department	By employee response
4. Introducing new employees to the campus community.	By employee response
5. Providing them with tools to be successful.	Employee's work performance

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CONTROLLER'S OFFICE STRATEGIC GOALS

PROGRAM REVIEW CATEGORY(IES):

#4 Innovation/Technology: Website development

Goal 2.1: Update Website to make it more appealing and user friendly.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Design a more appealing main page. Collaborate with department on their ideas as to what an appealing website might look like. Make initial update to website (layout, accessibility, navigation, info)	Brent partner with OIT		By November 2018		
2. Each area of expertise is responsible for their webpage content including links.	A departmental representative from each area working with Brent/OIT	x	x	x	x
3. Ongoing maintenance/review (semi-annually). Yearly updating or as processes, regulations, questions change.	A departmental representative from each area		x	x	August 2019

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	working with Brent/OIT				
4. In the GL slide deck and on our webpage add pictures of each of us with our contact information.	Brent/OIT		By November 2018		
5. Links provided to GASB, FASB, Sponsored Projects, Controllers Office, etc. as a quick reference for One Stop Shop and find information easier	Brent/Department		x		
6. Area on our website to assess how helpful website is (allows for continual improvement) Pop up survey. Did you find what you were looking for? 😊 😞 and Why are you happy or sad about your experience?	Brent/OIT		x		

Outcomes	How will progress be measured?
1. Easier for customers to use	Survey imbedded on website to elicit feedback
2. Easier for customers to navigate and find information	Survey imbedded on website to elicit feedback
3. Continue to provide the most up to date information	By having an informed campus
4. This will provide an additional resource for the user to get feedback from the department.	Compile questions and see where more training is necessary.

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5. Achieves well informed new and current employees	Contacting new and current employees on what they now believe was necessary training that would have made the new hire transition easier and more understandable. Have them assess the site after training information has been made available
6. Colorful and intuitive website for users to access with answers to most commonly asked questions and links to reference information	Ratings in semi-annual surveys with specific questions about the website's ability to answer questions without having to contact office directly
7. Questions are being answered through the website, less personal emails and phone calls. Resulting in more efficient use of time.	Ratings in semi-annual surveys with specific questions about the website's ability to answer questions without having to contact office directly

CONTROLLER'S OFFICE STRATEGIC GOALS

PROGRAM REVIEW CATEGORY(IES):

#6 Customers/Stakeholders

Goal 3.1: Survey our customers/stakeholders after contact with departments focusing on periods such as year-end.

Action Steps and Timeline	Individual(s), committee or groups assigned.	2017-18	2018-19	2019-20	2020-21
1. Annual in person survey to Finance group to collect feedback on our performance (allows for continuous improvement). For Survey Measure: timeliness, effectiveness, helpfulness, understandability	Department		At first Mtg of new FY		

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2. Offer opportunities for customers/stakeholders to visit us at our office at UOP to see where we are and what we do. For them to know that we are available to address their concerns in our smaller setting.	Department	Open House	x	x	x
3. Visit their departments to see their workspace, so we can get a better understanding of what they do in their areas, how the projects they are working on are affecting their departments; brings the process full circle. This personalized service demonstrates our interest of their departments.	Department		x		
4. Put a survey on our webpage and direct people there.	Brent		x		
5. Formalizing direct communication to the accounting program within COB. Attend the Networking Career Night and hold a lunch to invite accounting students to the office, this would give us a chance to talk about our specific duties.	Department		x		

Outcomes	How will progress be measured?
1. Continuously improve the service we provide to customers	Yearly survey
2. More open relationship with various departments	Small Questionnaires provided to various department PI's/Administrators. On what they would like to see from us and if personal visits will bridge any gaps that may be occurring between us and their departments.