



California State University, Chico

Chico, California 95929

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# **M E M O R A N D U M**

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January 12, 2007

To: Paul J. Zingg  
President

From: Dennis C. Graham  
Vice President for Business and Finance

Subject: Business and Finance Action Plan  
2006/07

It is with great pleasure to present the Business and Finance Action Plan on behalf of myself and the division I-Team members. This plan was developed after numerous meetings with our counterparts across the campus including directors, deans, and vice presidents. These meetings provided the division with direct input on concerns, problems, communications, relationships, observations, and recommendations about the division. The input from these meetings ranged from distrust and distain to praise and admiration. In all meetings we found opportunities to learn by providing more information or by asking for information or ideas that could be used to assist the processes. In all cases, the discussions were professional and extremely beneficial and helped to build renewed or new relationships. These items were not viewed in a context of specific problem solving but, instead, framed by our Strategic Plan, Values Statement, and principal institutional orientations (student learning/success, regional stewardship, civic engagement, community service, sustainability). The items were viewed with a mutual understanding of how the Business and Finance division could better meet the needs of the University and the extent to which these needs are being addressed through the services provided. Follow up sessions have been scheduled and additional meetings with departments and chairs are being planned.

The goal of the action plan is to clearly articulate the very essence and "fabric of the campus." In other words, what does the campus stand for; what does it represent; what are its values and principles; and how do our actions and values intentionally and deliberately support and portray

January 12, 2007

Page 2

each of the principal purposes of the University as stated in our Mission Statement: to foster student success through the creation of a high quality teaching/learning environment and to service the needs of our region.

As a starting point, we have structured the Action Plan within the University Strategic Plan in order to insure alignment at all times with the University direction. We are including a matrix of our action plan identifying the responsible person and the time table for each item. As part of our follow-up to each action, we will add a number of measures to insure we have completed each item, but more importantly we will contact all individuals involved to conduct a "lessons learned" session to improve the services in the future. These sessions are an opportunity to maintain relationships and to provide a feedback system and a reinforcement system of meeting our Strategic Plans.

One example of an opportunity to look at Business and Finance activities not in isolation, but as part of a larger strategic context, is in the budget area. As one of the cornerstones of the hexagon, our new budget module needs to be informative, transparent and meaningful to the entire campus, and we need to convey how it ties to and fulfills the institution's principle orientations.

We hope you accept this plan as a starting point – as something we want to continue to build upon in our desire to fully integrate with the campus direction and plan. The bottom line for us is student success and how each employee contributes to ensure all our students are successful.

Business and Finance Action Plan  
2006/07

**SP#1: High Quality Learning Environments (attractive, safe, friendly functional facilities)**

Believing in the primacy of learning, we will continue to develop high-quality learning environments both inside and outside the classroom.

- We will continue to focus on the University's Facilities Master Plan by providing regular status updates on the Major Capital Projects (i.e., Wildcat Activity Center, Student Services Center, Housing, Property Acquisitions, Transportation Study, Parking, and community (neighbors)).
- We will communicate on-going status and impacts of major and minor capital projects via e-mail, meetings, website updates, and announcements.
- We will recommend to the President and Cabinet reinstatement of the University Campus Planning Committee to enhance our communication and information to both internal and external constituencies related to all projects that impact the University Facilities Master Plan.
- We will communicate to the President and Cabinet the need for a Campus Business Continuity Plan as it relates to Executive Order 921 as well as the University's Emergency Preparedness.
- We will comply with Executive Order 921 by updating our Emergency Operation's Plan.

**SP#2: Scholarly and Creative Activity (professional development)**

Believing in the importance of faculty and staff, and their role in student success, we will continue to invest in faculty and staff development.

- To better communicate our many Business and Finance processes, we will participate in Dean/Department Chair orientations on a regular basis.
- We will communicate the status of "One University" to all Business and Finance staff and will stress the impact of customer service by offering solutions and explaining boundaries.

- We will develop a succession plan for anticipated MPP vacancies to ensure continuity of critical administrative functions.

**SP#3: Technology as Learning Enabler (wise use of technology)**

Believing in the wise use of new technologies in learning and teaching, we will continue to provide the technology, the related training, and the support needed to create high quality learning environments both inside and outside of the classroom.

- We will re-design the Business and Finance Web site for user friendliness; provide accurate information, as well as using the web sites as another tool of communication.
- We will complete a feasibility study for the Peoplesoft Budget Module.
- We will use our Business and Finance web page and campus announcements to communicate project status, committee status, etc., and will be exploring new means of communications such as a BLOG, RSS, and podcasting.

**SP#4: Serving the North State**

Believing in the value of service to others, we will continue to serve the educational, cultural, and economic needs of Northern California.

- We will increase our interaction with City and County officials by increased attendance at various meetings (City Council, Chamber of Commerce, Rotary).
- We will continue to focus on the University's Facilities Master Plan as well as serve the North State by building a Northern California History Museum. In the planning stages of this project, we will communicate regular project status updates to the campus and community. We will complete the CEQA study.
- We will assist Continuing Education in the event planning process for the several conferences related to the "Summit of the North State."

**SP#5: Institutional Effectiveness**

Believing that we are accountable to the people of the State of California, we will continue to diversify our sources of revenue and strategically manage the resources entrusted to us.

- We will provide institutional effectiveness by providing new budget model options, completing the phases of the revenue management program, as well as connecting to Peoplesoft a new budget module.
- We will complete Phase II of the Risk Assessment Plan.
- We will create a complete list of all Business and Finance committees with a committee process that includes: member responsibilities, as well as the purpose and mission/goals of the committee. We will post this information on the Business and Finance Web site.
- We will provide support and assistance to our University Advancement area by providing administrative support for budget preparation, assisting with various donor opportunities that may include various project information (maps, drawings, etc.), and integrate advancement committee representation to various business and finance committees as they relate to Advancement opportunities.
- We will increase the response and completion rate of projects by utilizing Delivery Order Contracting (DOC).
- We will spearhead a plan to expand special events funding to support all areas of our campus.
- We will continue to provide a self-assessment of all Business and Finance divisions by hosting and attending various meetings each semester with (but not limited to) all vice presidents, deans, department chairs, AA/S staff, and directors to increase our communication efforts, performance, direction; and will provide a year end report reflecting the actions taken.

**SP#6: Sustainability**

Believing that each generation owes something to those which follow, we will create environmentally literate citizens, who embrace sustainability as a way of living. We will be wise stewards of scarce resources and, in seeking to develop the whole person, be aware that our individual and collective actions have economic, social, and environmental consequences locally, regionally, and globally.

- We will complete a draft of a Sustainable Master Plan.
- We will track LEED certification of capital projects and provide status updates to the campus through announcements and the Facilities Planning web site.
- We will provide a status update regarding the Student Services Center Kiosk Project.
- We will develop a Transportation Demand Management plan (TDM) to assist with the efforts of creating alternative transportation programs