LEAD6

Six Roles of a Leader at Chico State

OCTOBER 16, 2019

CALIFORNIA STATE UNIVERSITY, CHICO

Today's Agenda – Using & Sharing Information

- Learning Objectives and Leadership Model
- Information You Can Use: Sources, Uses, and Choices of Funds
- Networking: Your Elevator Speech
- Learning Activity: What are we signing, and why????
- Announcements

LEAD6

Six Roles of a Leader at Chico State

A monthly leadership forum, centered around a rotation of the six roles of a leader

Action learning, with and from our campus leaders (that's all of us)

Program Expected Outcomes:

- Cohesive leadership framework for CSU Chico
- Strong cadre of leaders across the campus
- Connections between leaders to improve efficiency
- Increased confidence in leaders on the part of our employees

Today's Learning Objectives:

- Awareness of the sources, uses, and choices of campus funds
- What does your signature on documents mean (e.g., I got it; looked at it; understand it; approve it)

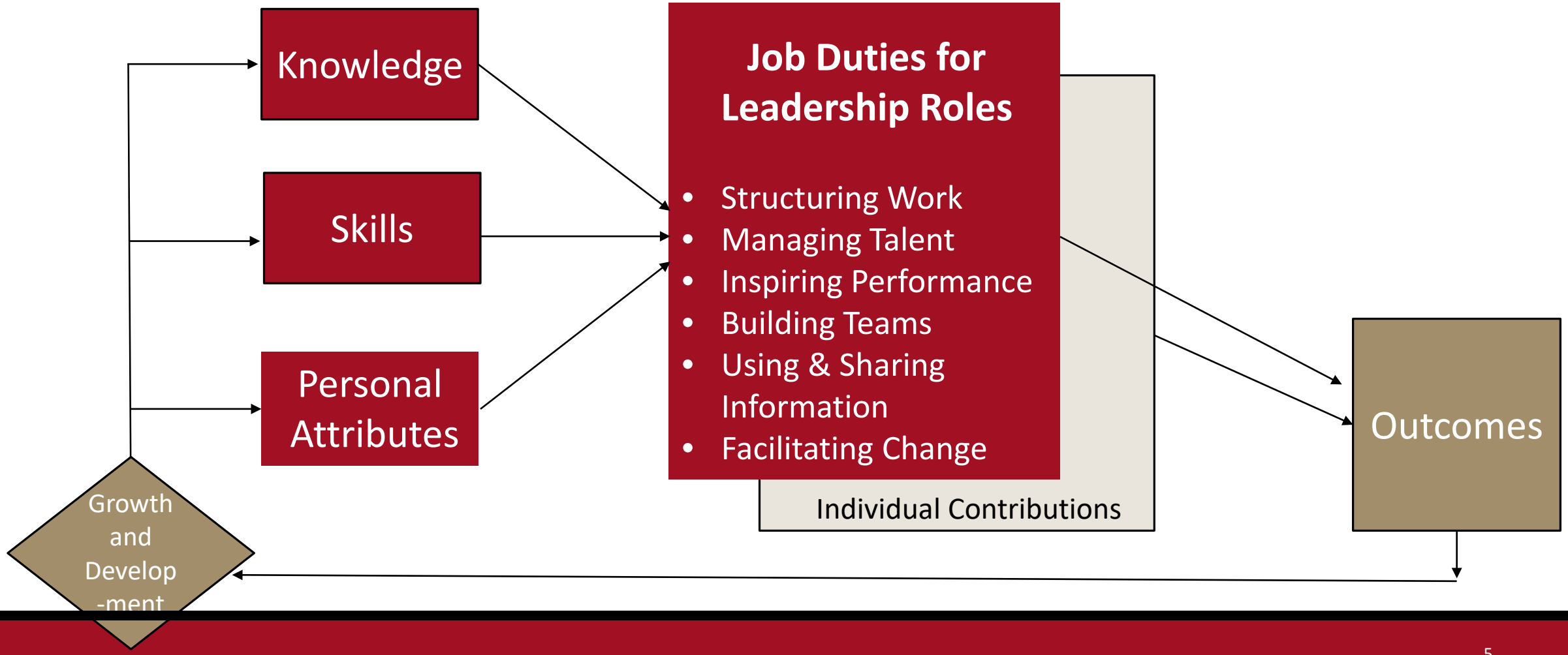
Why do we need a leadership model?

- So leaders know what is expected of them in order to “hold ourselves to high standards of professional behavior, ethics, and accountability”
- So employees know what to expect of their leaders
- To focus training and selection processes on areas of interest
- To reinforce our mission, vision, and enduring commitments

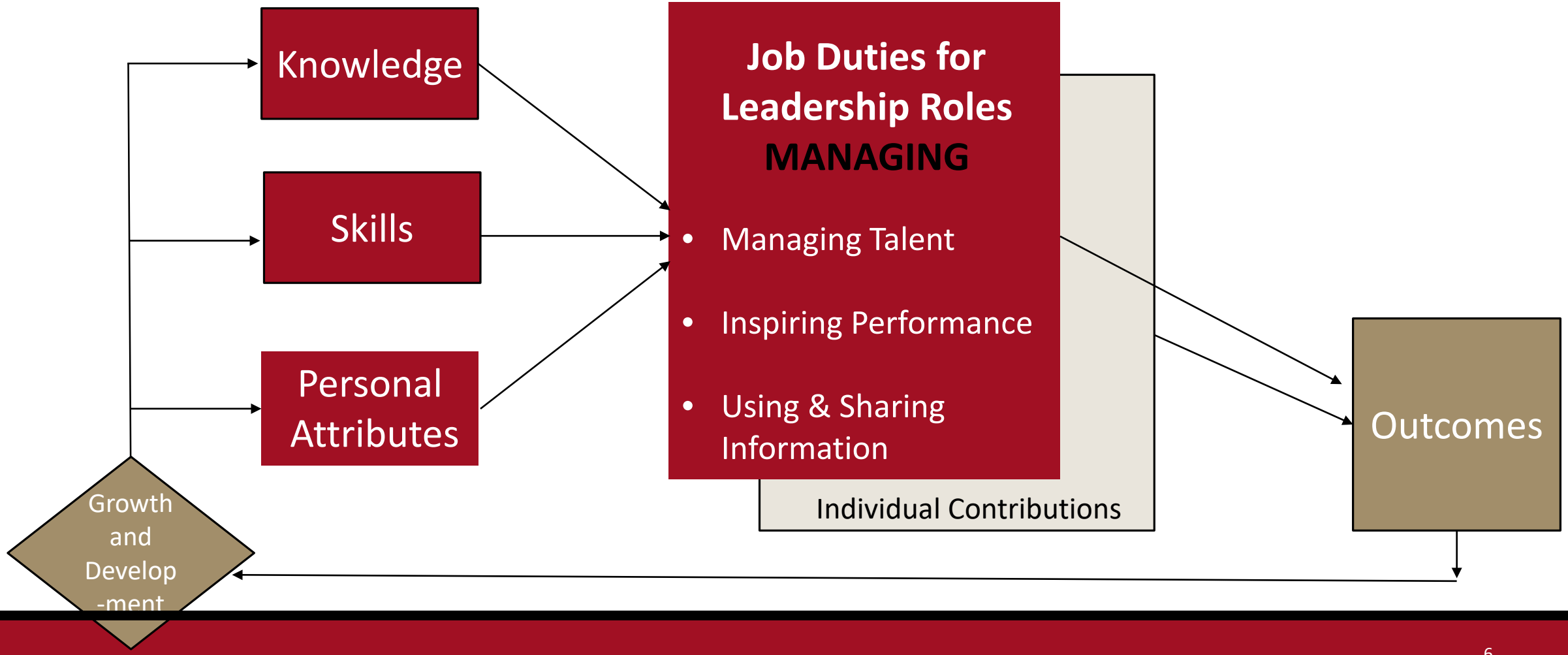
LEAD6

Six Roles of a Leader at Chico State

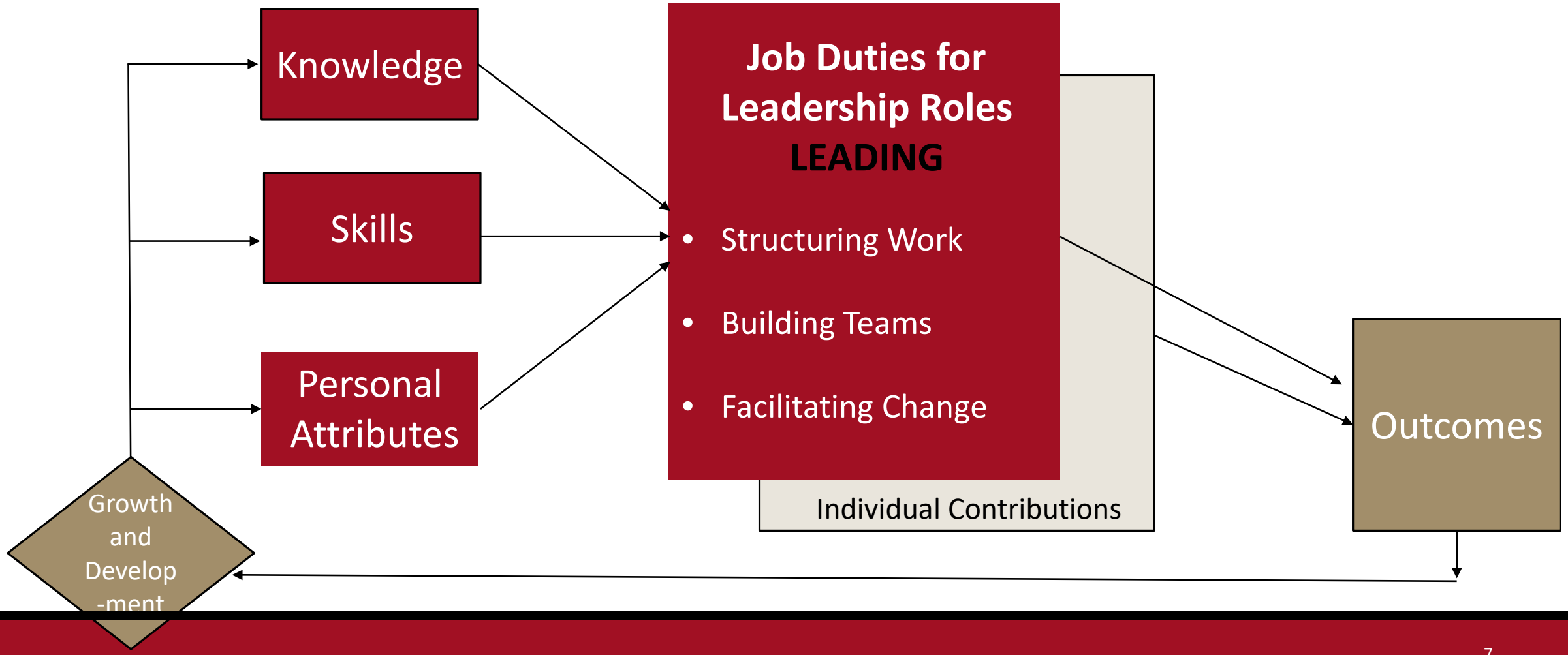
Multi-level Leadership Model



Multi-level Leadership Model



Multi-level Leadership Model



Why do we need both?

MANAGEMENT WITH OUT LEADERSHIP IS STAGNATION.

BUT LEADERSHIP WITHOUT MANAGEMENT IS CHAOS!

Information you can use

FUNDING SOURCES, USES, AND CHOICES

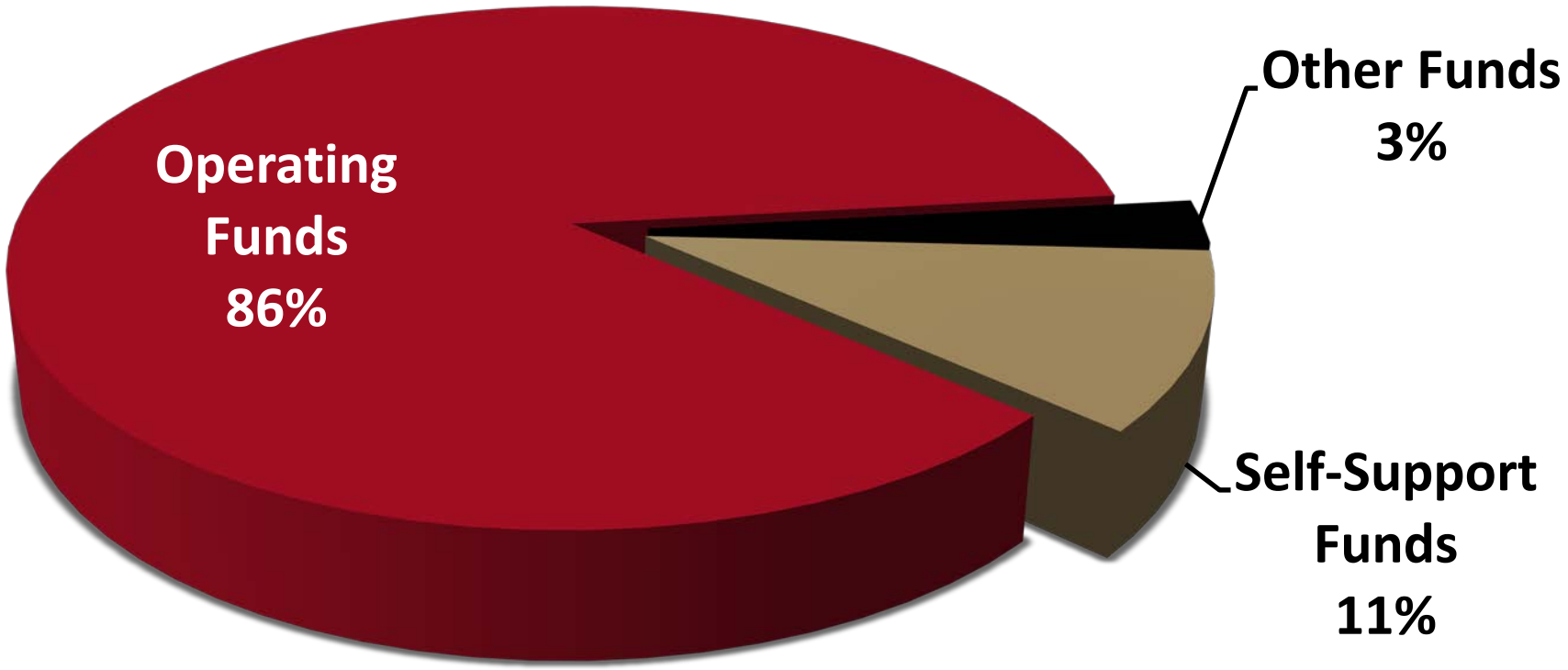
Using Financial Information

- Expectations about active financial management
- Awareness of traditional and emerging sources of funds
- Knowledge of appropriate uses of funds
- Choices leaders make regarding funding decisions
- Requests you have of your budget partners

Funding Sources

State	Auxiliary
$287 million	*$74 million*
• Operating Funds • Self-Support Funds • Other Funds	• Associated Students • Chico State Enterprises • University Foundation

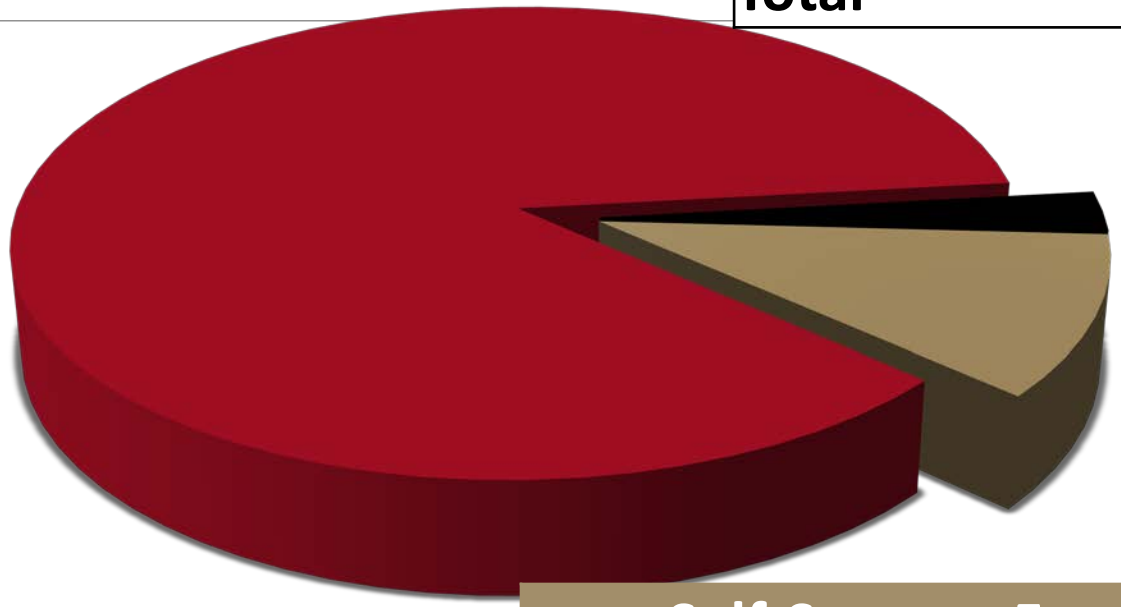
State Funds - $287M



State Funds - $287M

Other Funds – 3%	
Lottery	$ 1,487,000
IRA Funds	5,665,304
Total	**$ 7,152,304**

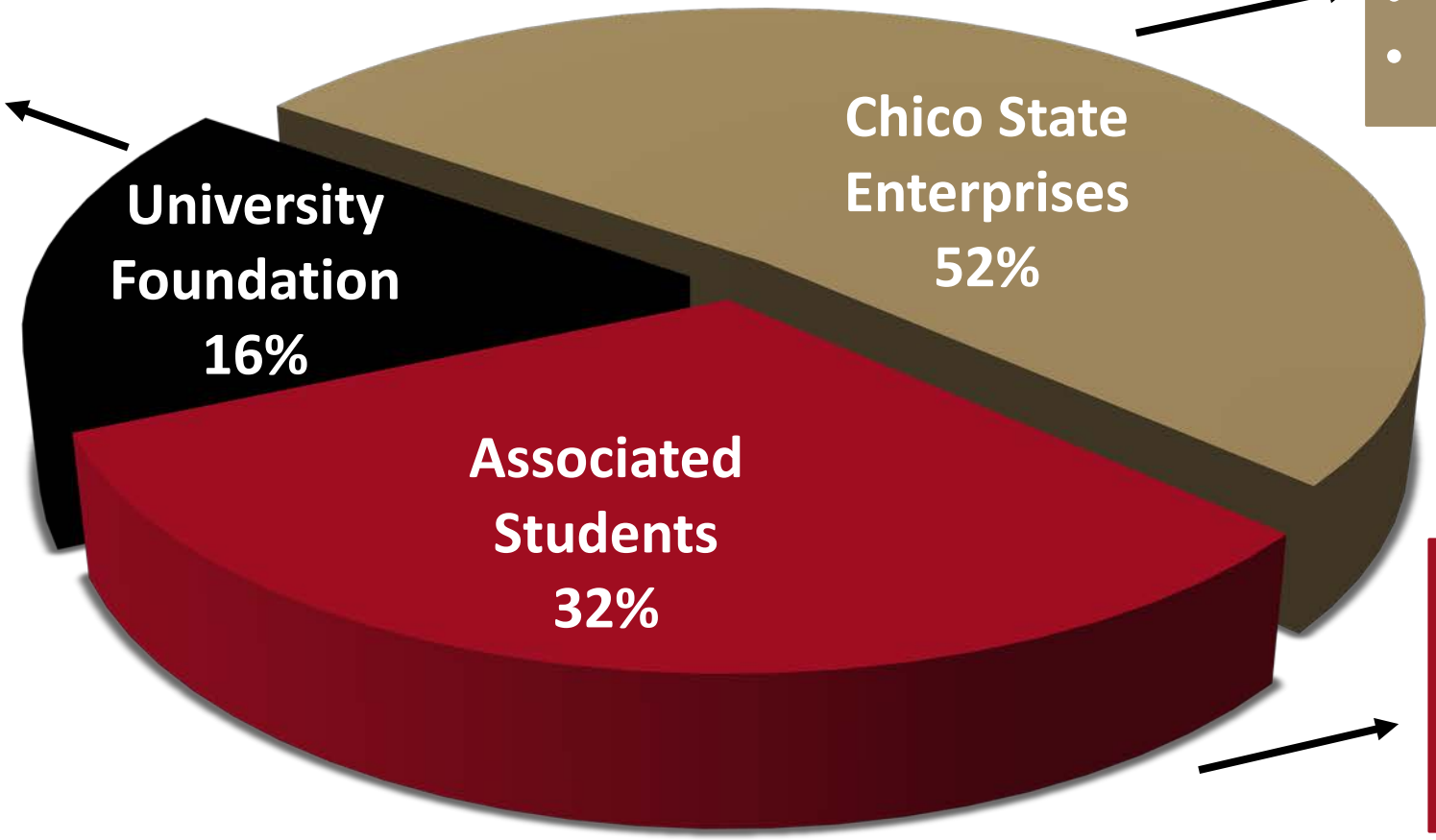
Operating Funds – 86 %	
State Support	$140,015,432
Tuition Fees	91,500,000
Non-Resident Fees	2,830,000
Application & Misc Fees	1,280,000
Student Health Fees	8,025,000
MBA/CCF/SLF Fees	2,930,000
Work Study	2,036,629
Total	**$248,617,061**



Self-Support Funds – 11%	
Housing	$ 23,738,597
Continuing Education	5,642,170
Parking	1,635,000
Total	**$ 31,015,767**

Auxiliary Funds - $74M

- Scholarships
- Endowments
- Annual Gifts
- BOG Awards



- Grants & Contracts
- Campus Programs
- University Farm
- NSPR

- Dining & Food Service
- AS Activity Fee
- Child Care Center
- BMU & WREC Ops

Funding Uses

✓Unrestricted

✓Restricted

Operating Funds	
State Support	$140,015,432
Tuition Fees	91,500,000
Non-Resident Fees	2,830,000
Application & Misc Fees	1,280,000
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Funding Uses

Base *(ongoing)*

- Personnel costs
- Annual agreements
- Printing
- Travel

Onetime

- Special consultants
- Independent contractor
- Equipment replacement
- Implementation costs

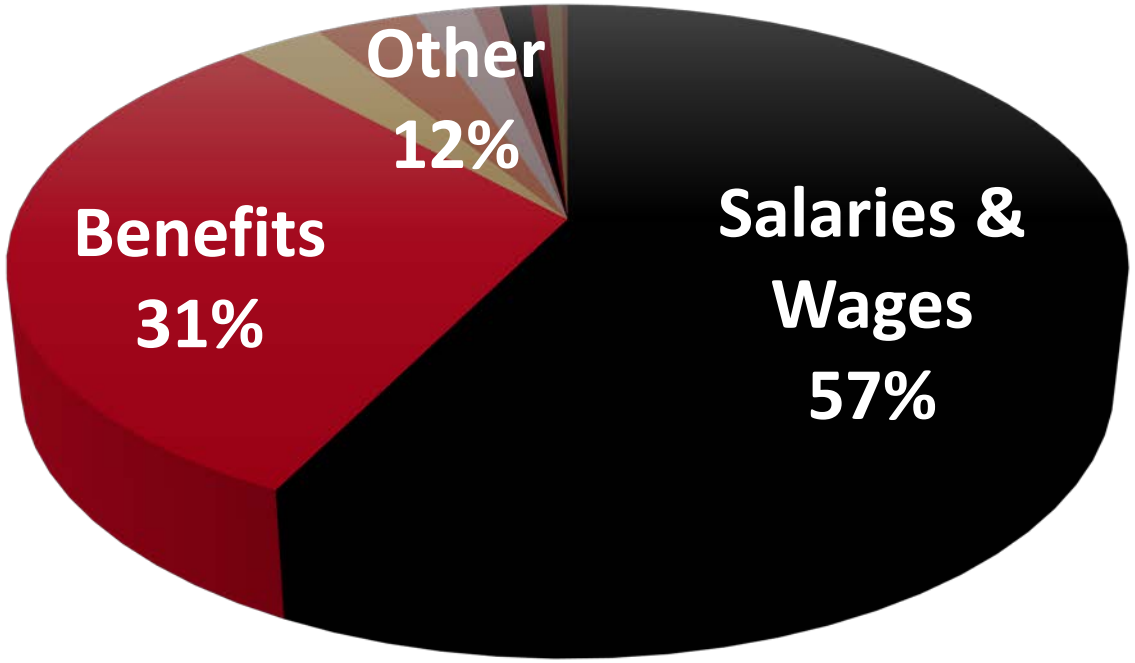
Funding Choices

Why does it matter?

Leverage supplemental funds

- Lottery
- Campus Partner
- Restricted student fees
- Grants & contracts
- Fundraising

2018-19 Operating Fund Expenses



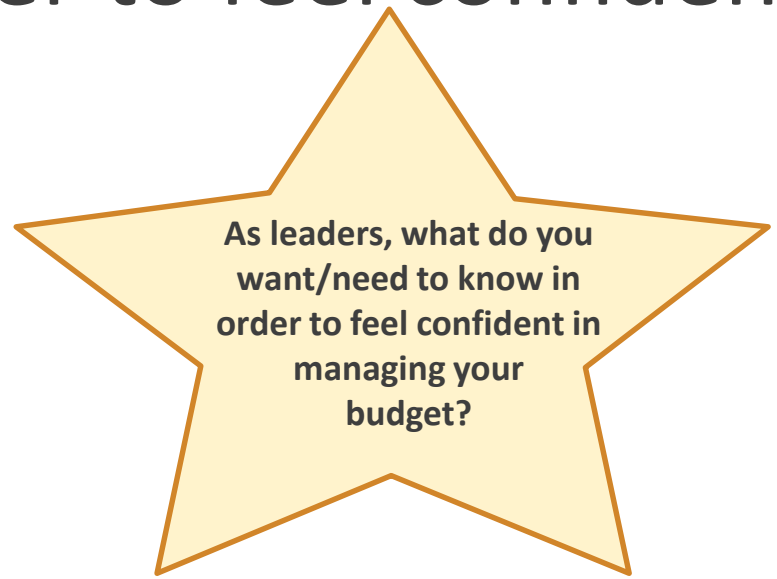
Funding Choices

What do I choose to spend first?

- Restricted whenever available
- Onetime funds for onetime expenses

Funding Choices

As leaders, what do you and your colleagues want/need to know in order to feel confident in managing your budget?



Networking Activity

MEET AT LEAST 5 PEOPLE, AND SHARE YOUR 30-SECOND ELEVATOR SPEECH

Learning Activity

ROBOSIGNING VS CONSCIOUS DECISION-MAKING

Organize into groups of 5

BE AS DIVERSE AS POSSIBLE BY CAMPUS DEPARTMENTS SO AS TO INCREASE THE LIKELIHOOD THAT YOUR FORM IS KNOWN

What does your signature indicate?

What value does your (and others) signature add to a document? (is it value-added?)

Do you really need to spend time to review and sign? Why or why not?

Are you being a good steward of public funds?

Is this request….

- Reasonable?
- Appropriate?
- Affordable?
- Conflicted in any way?
- Sustainable?
- Equitable?

What are the most important pieces of information on the form? Where are there likely errors?

What does your signature commit the campus to doing?

Key Learnings/Takeaways

Special Consultant Agreement: no one could explain or understand it. Couldn't get started because it was not comprehensible. What does the question ask? Hard to identify what the right answer options might be.

Attendance Certification Form: green sticky arrow indicates the need to sign. We do absence reporting on-line, so we don't know exactly why this is necessary. We need to know why we need to have a "wet signature". It's to certify that everyone on the report is due a paycheck. Technically, checks shouldn't be released without that certification. There should be a report with names attached. Nobody should sign the reports, just the statement.

Corporate Travel Card Request Form: there are companion formstht go with it that perhaps could be consolidated onto one form so that if it does have to be signed, it could all be on one form. There's critical information missing. Who really reports to whom?

Key Authorization Form: beautifully designed; takes a minimal amount of information and easy to understand, but completely worthless. No one gets charged $25. Go CARD SWIPE!

Request to Fill: (groan!) In general, it's good, as it's the last document. The least important info is the committee information (not necessary? But they will have to be verified as having Avoiding Bias in Hiring training). Have a hyper-link to the salary schedules would help! Use as a checklist for all the necessary documents. Being updated as Chico State goes to PageUP (will be eliminated).

Travel Request Approval Form: still in use for another 18 months. There's a box that suggests there's no expense associated with travel, so why is this necessary? To communicate someone's gone, but maybe not for the original purpose. Is the person on a normal course of work? 5 signature lines? Really??!! Why re-sign if expense is less.

Good of the Order/Announcements

Avoiding Bias in Hiring training

Title IX online training due October 1

Sexual Harassment Prevention due by year-end

Next LEAD6 session November 13, 2019: Inspiring Performance

- Strategic Plan implementation

World Record Corn Hole tournament October 25, 3 pm, Yolo Field

Sutter Courtyard

Hoorah Run, November 9th

Rocky Horror Picture Show, through the weekend. Support thecampus production.